University of Alberta

Identity Construction Through Interorganizational Relations

by

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Dedication

This research is dedicated to the following people, without whom this work would not have been completed. To Bob Loo for his confidence and inspiration, and to my parents, Arthur and Rena Loewen, who raised me to finish what I start.

Abstract

This dissertation is a conceptual exploration of process in interorganizational relations (IORs). My exploration of field material at three historic sites in Southern Alberta suggested that the three facility managers were struggling with issues of how to identify potential IO partners. The three historic sites presented unique organizational identities that I understood as The Pretender, The Trickster, and The Deceiver. Through my exploration of the IO literature, I developed a conceptual model in which the site's identity was pivotal for understanding how IORs were formed and maintained. Identity was the lens through which the organization, or more specifically its managers, interpreted the motives or interests held by other actors in the environment. My analysis suggested that the managers (and occasionally other employees) used narratives to construct each site's identity and that: site identity became the lens through which the managers of the site interpreted the motives of the other actors; IO interactions served to either reconstruct or contest the site's identity; successful IO interactions were unable to be formed with actors that contested the organization's identity. Based on this analysis, I argued that we can understand IORs as contestations or constructions around identity.

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Chapter One

Introduction to the Research

> ". . . a man is always a teller of tales, he lives surrounded by his stories and the stories of others, he sees everything that happens to him through them; and he tries to live his life as if he were telling a story." – Jean-Paul Sartre

This dissertation is part of a larger study funded by the Social Sciences and Humanities Research Council (SSHRC). The study, conducted by Dr. David Cooper and Dr. Barbara Townley of the University of Alberta's Faculty of Business is entitled "The managerial construction of New Public Management" (e.g., Townley, 2002). It continues the previous SSHRC-funded project by Townley and Cooper, entitled "Ethical issues and public sector restructuring: Performance indicators and accountability" (Oakes, Townley, & Cooper, 1998; Townley, Cooper & Oakes, 2003). In early 1998, I joined this existing research team because I was interested in studying interorganizational relations in the public sector environment. I had recently learned of the development of public-private partnerships in that sector, and was interested in studying the implications of these new partnerships for managing in the public sector. My own administrative work experience in Alberta's publicly funded postsecondary environment suggested that public sector restructuring and budget cutbacks have a high human cost. Indeed, I had witnessed firsthand the increased workloads and the role conflicts people felt as they struggled to cope with externally mandated cutbacks and new accountability measures. Thus, I believed that provincial government managers would also struggle, as they learned to interact in a new way with their external stakeholders.

In the summer of 1998, I conducted initial fieldwork in three public cultural organizations in Southern Alberta. The purpose of this initial work was to familiarize myself with the sites and develop important research contacts for my planned future research on interorganizational relations at those sites. However, I also wanted to begin my investigation of how the facility managers dealt with issues that arose as they interacted with their community stakeholders. That is, I wanted to understand how the managers initiated and sustained new relationships with appropriate external groups and organizations. These relationships were important to the managers, since they could help the site to meet the provincial government's new standards for fiscal responsibility and accountability to the citizens of Alberta.

During this initial fieldwork, I kept notes and collected various organizational documents. In the fall of 1998, I returned to Edmonton to resume my on-campus doctoral coursework. Over the succeeding months, I delved further into the interorganizational literature, to prepare for my planned future field research at the sites. I believed that the literature on interorganizational relationships would allow me to explain why and how the facility managers would form interorganizational partnerships with certain organizations. I also hoped the literature would explain why some partnerships were more stable or successful than others. Thus, this dissertation is the result of my research journey, and more specifically, my attempts to make sense of my fieldwork notes and the literature on interorganizational relations. In the following chapters of the dissertation, I describe the process through which I tried to develop an understanding of my initial field notes and the interorganizational literature. In this first chapter, I describe the purpose and delimitations of the study, followed by a description of my initial fieldwork and the three field research sites. In the following section, I discuss the importance of interorganizational relationships, given that this is the theoretical focus of my interest.

Interorganizational Relations

In this section, I provide background information on the overall topic of interorganizational relations (IORs). The section begins by defining what is generally meant by the term IOR and provides my own definition of an IOR. I then explore why organizations increasingly enter into these relationships, and why they often fail. In a subsection, I discuss the complexities and criticisms of research on interorganizational relations.

Interorganizational relationships (IORs) are "the often patterned relations *between* two or more organizations which result from inter-organizational action or behaviour" (Sydow, 2002, p. 127). Those interorganizational interactions involve "transactions, flows, and linkages" between organizations (Oliver, 1990, p. 241), and develop when organizations interact regularly, rather than only sporadically (Reitan, 1998). Since IORS are developed through long-term, ongoing interactions among organizational actors, they are dynamic over time (Ritter & Gemünden, 2003). Thus, I define an IOR as an ongoing, dynamic link between an organization and an external organizational actor.

Organizations must work actively to develop and maintain successful IORs. In particular, they must invest time and other resources to ensure their success. Interorganizational relations also have an "atmosphere", according to Ritter and Gemünden (2003). That is, various empirical studies point to a tone or quality, such as trust or distrust, which develops within the IOR as the partners participate in ongoing interactions.

Why do organizations form these interorganizational relationships? Through engaging in IORs, organizations attain access to important inputs or resources, such as raw materials, people, financial capital and knowledge (Sydow, 2002). Also, although organizations cannot influence all other interorganizational actors with which they interact, they can try to achieve their own goals, by managing individual IO relationships (Ritter & Gemünden, 2003). Thus, an organization's IORs are an important resource, which can provide a competitive advantage.

Since the early 1980s, both profit and non-profit organizations have increasingly used IORs to enhance their long-term survival and overall performance (Sydow, 2002). Organizations have developed stronger IORs with both customers and suppliers, as they strive to develop and market a greater variety of products and services. Organizations have also turned to IORs, to adapt to globalization and the consequent need for standardized technologies. For example, in many industries such as automobile manufacturing, organizations now create value for their end-user by outsourcing some key activities to their suppliers (Ritter & Gemünden, 2003). More organizations are also entering into strategic alliances and joint ventures. In these types of IORs, the organizations pool their resources to enhance innovation and reduce the risk of entry into new markets. Since technology is changing so quickly, few organizations have all the strengths and resources needed to compete in a global marketplace (Doz & Hamel, 1998). More importantly, strategic alliances allow organizations to access the knowledge held by other organizations, especially the collective tacit knowledge held by their employees. Finally, technological developments have led to `virtual' organizations, typically defined as project-based, cooperative interorganizational relationships (Ritter & Gemünden, 2003).

Interorganizational theory is important, because we increasingly recognize that an organization's performance, and even its continued existence, is dependent upon interorganizational linkages (Oliver, 1990). That is, organizations are interconnected with their environment, and will not survive, much less perform well unless they develop key IORs, either as formal alliances or relatively informal interactions. However, given the high failure rate for IORs, the literature raises some apprehension about the growing number of organizations entering into them (Barringer & Harrison, 2000).

IORs fail for two main reasons. First, organizations often over-estimate the benefits of participating in an IOR. For example, Doz and Hamel (1998) suggest that strategic alliance partners often find it difficult to accurately predict the market's future size and direction, and the reactions of competitors to the partnership. Second, organizations often encounter difficulties in administering such complex relationships. Interorganizational relationships are "inherently fragile", and thus difficult to manage (Kanter, 1989, p. 159). Causes of this fragility can include the different levels of commitment held by the IO partners. Often, the IOR is more important to one partner, because of its centrality to key activities. Alternatively, an IOR may be fragile because it includes a power imbalance, as one partner subsidizes the other by contributing more resources to the relationship. Most importantly, however, many IORs are simply "undermanaged" (pp. 167-168), with little time devoted to developing the necessary internal structures and systems to support the IOR. Often, IO partners never develop common procedures or even a system for cooperative decision-making, leading to conflicts and unhealthy internal politics. In recent years, the management of IORs has become even more difficult, as IO partners struggle to cope with challenges such as constant technological innovations, the increasing need for capital, and shorter product lifecycles (Sydow, 2002).

Research on Interorganizational Relations

Research on IORs is often highly complex, simply because we can identify three main types or forms of IORs (Grusky & Erger, 2000; Hall, 1999). The simplest and most straightforward type is the dyad or dyadic pair, an IOR between two organizations. The organizational or interorganizational set is slightly more complex, involving the dyadic or pairwise IORs between a focal organization and at least two other organizations with which it interacts (Grusky & Erger, 2000; Hall, 1999). Action sets are simply temporary interorganizational sets, developed for a short-term purpose (e.g., Aldrich 1979; Aldrich & Whetten, 1981). Interorganizational networks are the most complex form of IOR (Aldrich, 1979; Grusky & Erger, 2000; Hall, 1999). They include a complete set of organizations that interact for a common purpose, and all the links among that population of organizations.

Research on IORs is also often highly complex since, for each of these three main types of IORs, researchers can focus on several different levels of analyses (Hall, 1999). For example, when studying a dyadic pair, researchers can study the two organizations, their relationship, the environment in which the two organizations interact, or the people involved in managing the IO relationship. Obviously, the degree of complexity increases when studying an interorganizational set or network. The complexity of the field is important to note, because it often becomes difficult to assess the success of IO relationships (Hall, 1999). That is, since we can study IORs at several levels, their success can be assessed from the perspective of several individuals as well as organizations.

Over the past two decades, many theorists have criticized the existing literature on IORs. We can group these criticisms into three categories. First, according to some authors, the IO literature is highly "fragmented" (e.g., Galaskiewicz, 1985; Ritter & Gemünden, 2003). This has occurred, according to Ritter and Gemünden, because researchers have approached the topic from a variety of backgrounds or schools of thought. Complicating matters, European researchers often use qualitative methods to increase their general understanding of IORs. In contrast, U.S. researchers typically use quantitative methods, with the more prescriptive aim of learning how to manage IO relationships. Thus, the field has become highly fragmented, with some groups of scholars ignoring the research of others. Due to this fragmentation, IOR research is largely non-cumulative or `additive' (Oliver, 1990, p. 242). In Oliver's view, for example, little effort has been made to integrate findings and develop a more general theory of why IORs are formed.

Second, theorists have also criticized the content of past IO research. For example, Galaskiewicz (1985) argued that IO scholarship would advance only if researchers studied the context of the IOR, and the different actors' motives for entering into an IOR. Also, some critics believe that researchers have focused too much on positive IORs, perhaps because those stories are more appealing (Ritter & Gemünden, 2003). They argue that we also need to look at the `dark side' of IO relationships, to understand why and how organizations become locked into unsuccessful IO relationships that hinder them from achieving their goals.

Third, little IO research has focused on issues of process. Almost two decades ago, Whetten (1987) called for more longitudinal research on IORs. "To date, few investigators have directly examined the developmental aspect of interorganizational linkages." (p. 251). More specifically, he argued that we needed to study the dynamic processes through which managers formed, maintained and discontinued IORs. Since then, other theorists have joined that call. For example, Bluedorn and others noted that little IO research had examined how organizations entered into and maintained their IORs (Bluedorn, Johnson, Cartwright, & Barringer, 1994).

Purpose and Delimitations of the Dissertation

The dissertation is *conceptual* exploration of process in interorganizational relations. Thus, the primary goal of the research is to explore how IORs take shape between organizations and external actors. Through exploration of these processes, the research contributes to our understanding of this important structure. To accomplish this, I review the literature on interorganizational relations and develop a suggested conceptual framework for understanding IORs. Then, I illustrate that framework with my interpretation of interview narratives at the three southern

Alberta cultural organizations.

As a secondary goal, this conceptual dissertation allows me to describe my research journey. Specifically, it allows me to explore the thought processes involved in research, a part of the research process that *empirical* dissertations normally omit. I believe this exploration of the literature provides a necessary precursor to my planned, in-depth empirical research on process in interorganizational relations.

Two key delimitations of the research are also noteworthy. First, from the outset the research was planned as conceptual, culminating in the development and *illustration* of a conceptual framework. In future research, I will return to the field to test and make changes to the proposed conceptual model. Second, the empirical material is provided only to illustrate the proposed conceptual framework. The interviews were conducted within three cultural organizations from the public sector. Thus, I cannot state with certainty that my framework will allow me to understand interorganizational processes in other sectors.

The Initial Fieldwork

In summer 1998, I conducted initial fieldwork in three Southern Alberta cultural organizations: Frank Slide Interpretive Centre (FSIC), Head-Smashed-In Buffalo Jump (HSIBJ), and Remington-Alberta Carriage Centre (RACC). All these organizations are provincial Historic Sites associated with Alberta Community Development (ACD), as shown in Figure 1.1. As described earlier, during that research I began to examine how the facility managers dealt with issues that arose as they interacted with their community stakeholders, their potential interorganizational partners. In the sections that follow, I provide details on that initial field research.

The Field Research Setting

ACD's Cultural Facilities and Historical Resources Division operates eighteen provincial historic sites and museums across the province (Alberta Community Development [ACD], 1997a). The division's main activity involves "preserving, protecting and presenting Alberta's unique cultural and natural history" (ACD, 1997a, p. 5). My initial field research focused on the three interpretive centres

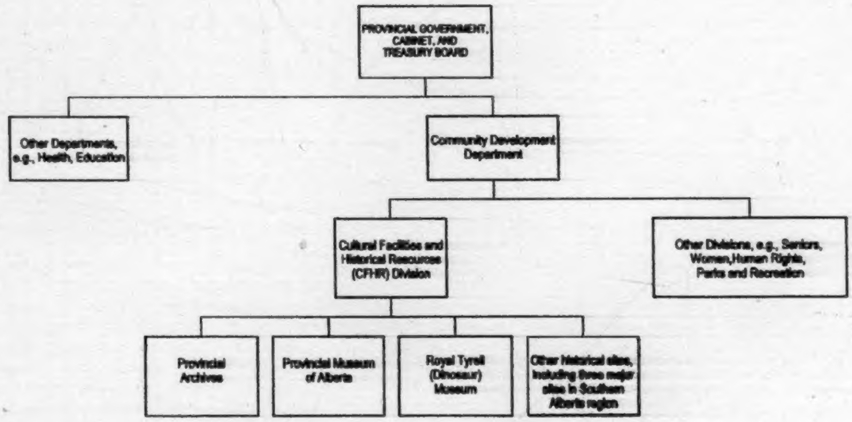
PROVINCIAL GOVERNMENT, CABINET, AND TREASURY BOARD
Other Departments, e.g., Health, Education
Community Development Department
Cultural Facilities and Historical Resources (CFHR) Division
Other Divisions, e.g., Seniors, Women,Human Rights, Parks and Recreation
Provincial Archives
Provincial Museum of Alberta
Royal Tyrell (Dinosaur) Museum
Other Historical sites, including three major sites in Southern Alberta region

Figure 1.1. Position of three southern Alberta cultural sites in provincial government department's organizational chart. *Note.* Adapted from Oakes, L. S., Townley, B., & Cooper, D. (1998). Business planning as pedagogy: Language and control in a changing institutional field. *Administrative Science Quarterly, 43,* p. 262.

in the province's southern region. The three sites are close together geographically, as shown in the map provided as Figure 1.2. They also share the same mission of preservation and presentation of Alberta's cultural heritage. However, the sites differ markedly in many respects. Specifically, they display different types of collections, portray representations of different ethnic cultures, and interact with different sets of important community stakeholders. In this section, I provide background information on the three sites.

Frank Slide Interpretive Centre. Frank Slide Interpretive Centre (FSIC) is found in the Municipality of the Crowsnest Pass, approximately 140 kilometres west of Lethbridge, my base during the initial fieldwork (Alberta Economic Development and Trade [AEDT], 1989). Built in 1985, the facility is surrounded by Canada's Rocky Mountains. The Crowsnest Pass is the lowest pass over the Canadian Rockies and spans approximately 100 kilometres (60 miles) across the southern Canadian Rockies between Alberta and British Columbia (Anderson & Turnbull, 1983a; Oldman River Regional Planning Commission [ORRPC], 1964).

In April 1903, part of Turtle Mountain broke off and slid through Frank, a small mining town in the Crowsnest River Valley (Welch & Payne, 2002b). Many tons of rock crashed down Turtle Mountain, burying houses and farms, roads and the railway (Anderson, 2002). Seventy people were killed (Welch & Payne, 2002b). The rubble from the Frank Slide was about 30 metres (100 feet) thick, and reached across the valley to the other side, leaving a long-term effect on the landscape (Oldman River Intermunicipal Service Agency [ORISA], 2001). The cause of the Frank Slide is still unknown (Welch & Payne, 2002b). Some speculate that the mountain became unstable due to a combination of erosion, dangerous coal mining practices, and an earthquake (Anderson, 2002).

The Frank Slide Interpretive Centre overlooks the three-kilometre span of the Frank Slide (Dawson, 1995). The Centre tells the story of the Crowsnest Pass through a variety of exhibits and programs. An award-winning slide show presentation is shown in the theatre. The presentation is narrated by W. O. Mitchell, a well-known Canadian author of fiction, and accompanied by music from Connie Kaldor, a Saskatchewan-born singer and songwriter. The slide show presents

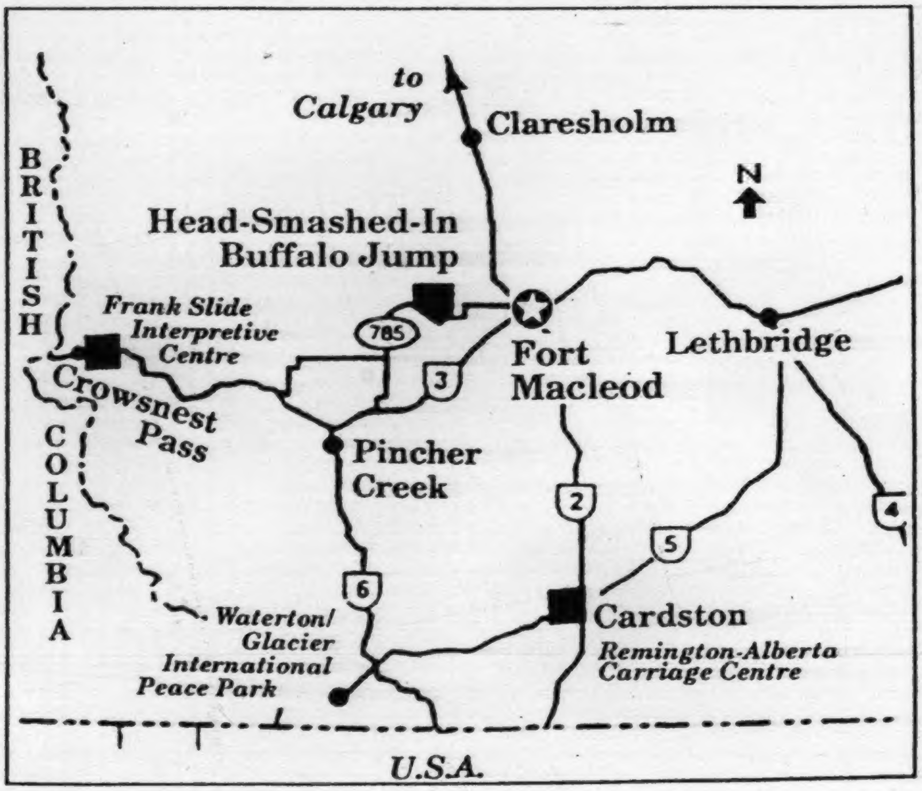
to Calgary
Claresholm
N
BRITISH
Head-Smashed-In Buffalo Jump
Frank Slide Interpretive Centre
785
Fort Macleod
Lethbridge
3
Crowsnest Pass
Pincher Creek
COLUMBIA
2
4
5
6
Cardston
Remington-Alberta Carriage Centre
Waterton/ Glacier International Peace Park
U.S.A.

Figure 1.2: Location of three Southern Alberta historic sites. *Note*. From The Friends of Head-Smashed-In Buffalo Jump. (1996). *Buffalo Bulletin*. Fort Macleod: Author, p. 8.

information about the different communities in the Pass, and includes a striking re-creation of the Frank Slide.

The Frank Slide Interpretive Centre was constructed near the site of the Frank Slide (Welch & Payne, 2002b). The facility does interpret the Frank Slide, as its name suggests. However, it also includes exhibits and interpretive programs on the history of the region's coal-mining towns, construction of the Canadian Pacific Railway (CPR), settlement by European immigrants, and early coal mining activities (ACD, 1997b). The facility also interprets other historic sites in the valley, including the Bellevue Mine and the Hillcrest Cemetery (Welch & Payne, 2002b). Many of the victims of the Hillcrest mining disaster, Canada's worst, are buried at the cemetery. The Centre also has several outdoor interpretive trails. Currently, it attracts approximately 50,000 visitors each year (Bergman, 2003). Figures 1.3 through 1.5 provide related photographs from my initial fieldwork at the site.

Head-Smashed-In Buffalo Jump. Head-Smashed-In Buffalo Jump (HSIBJ) is located 18 kilometres northwest of the Town of Fort Macleod, in the Porcupine Hills of southwestern Alberta (Brink, 1995; "Chronicling," 1990). The 11-metre high buffalo jump was used by Plains First Nations peoples to kill large numbers of buffalo, beginning about 6000 years ago and ending perhaps as recently as 150 years ago (Brink, 1995; "Chronicling", 1990). The buffalo jump is one of the oldest and best preserved in North America, even though European-Canadians began settling in the area almost two centuries ago ("Chronicling", 1990). The site was identified as an important archaeological area in the 1930s, and became a National Historic Site in 1968. In 1981, UNESCO designated the buffalo jump as a World Heritage site.

A nineteenth century employee of the Geological Survey of Canada noted the origins of the buffalo jump's name (Reid, 1992). Apparently, a young man had wanted to see the buffalo hunt from under the cliff. He positioned himself against the cliff, and watched as the buffalo hurtled over it. However, as their numbers grew, the pile of carcasses grew higher and held him against the cliff's wall. When the people arrived to butcher the buffalo, they found him crushed by the weight of the kill. Thus, in the Blackfoot language, the spot is called `where he got his head smashed in'.

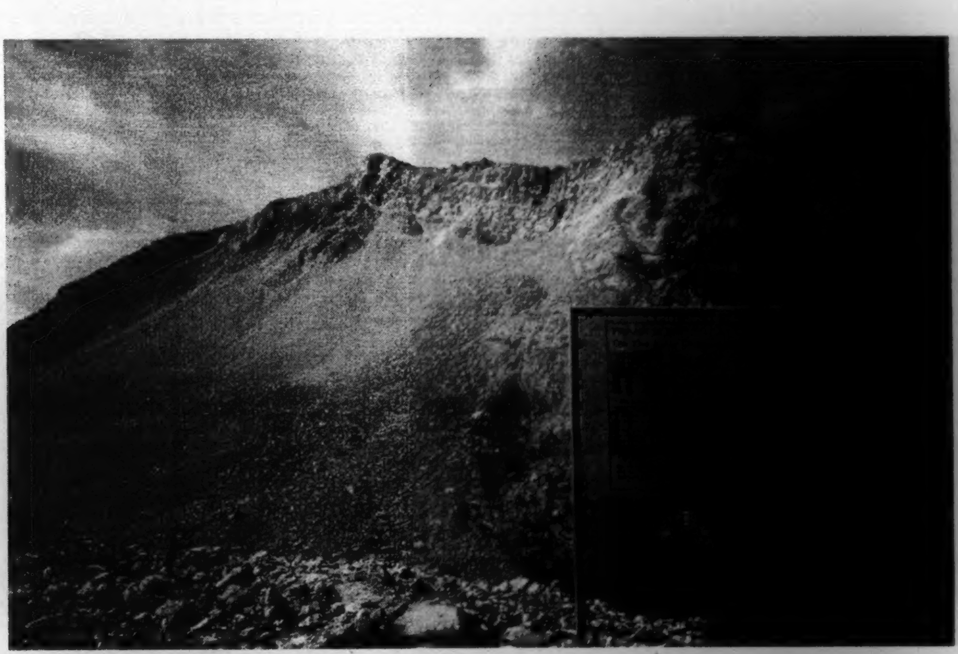

Figure 1.3. Turtle Mountain and the Frank Slide from the edge of the highway.

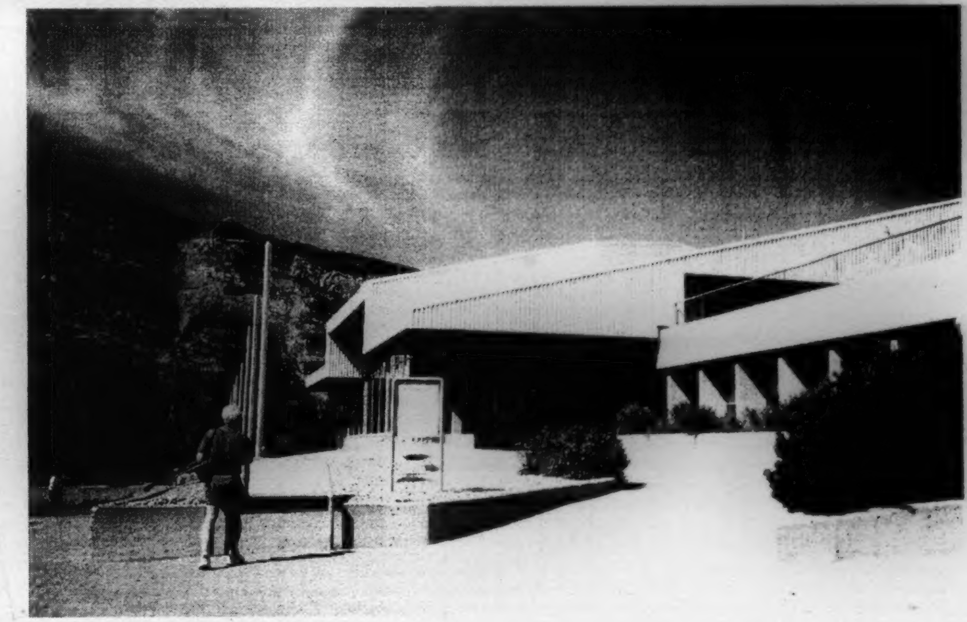

Figure 1.4. Entrance to the Frank Slide Interpretive Centre.

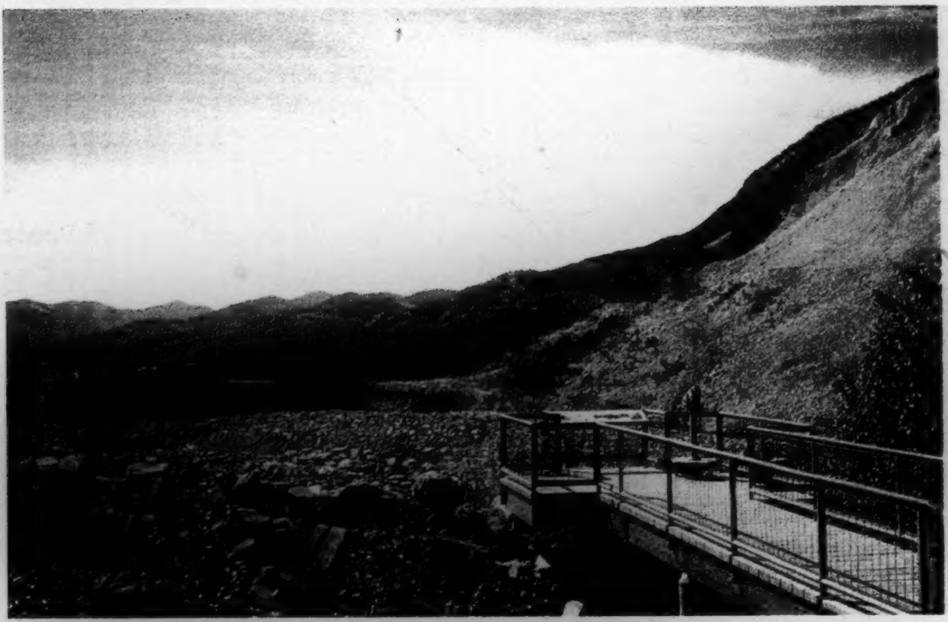

Figure 1.5. FSIC viewpoint overlooks the Slide.

The jump actually includes a broad range of archaeological properties, including the butchering area below the jump, and a collection basin above the cliff (Welch, Payne & Brink, 2002). Through sophisticated hunting techniques, the Blackfoot peoples stampeded herds of buffalo over the cliff (Brink, 2002; "Chronicling," 1990). The bison were gathered in the collection basin, and then, through the use of decoy techniques and steering lanes, stampeded over the cliff (Welch, Payne & Brink, 2002). Meanwhile, more hunters waited at the bottom of the cliff to kill and butcher the buffalo for their meat, bone and sinew (Brink, 2002). Archaeologists have discovered a rich record below the cliff, consisting of buffalo bones, weapons, tools and other artifacts, in a layer up to 10 metres in depth ("Chronicling", 1990). Indeed, it is claimed that HSIBJ is one of the richest archaeological sites of any type on the prairies of North America (Welch, Payne & Brink, 2002). In Figures 1.6 and 1.7, I provide related photographs of the site and its surroundings, also from my field research at the site.

Remington-Alberta Carriage Centre. The Remington-Alberta Carriage Museum (RACC) is located in Cardston, a small town of 3,500 people in southwest Alberta (Alberta Tourism, 1989). Cardston lies about 35 km north of the United States border, and 210 km south of Calgary or 75 kilometres southwest of Lethbridge (Alberta Tourism, 1989; Pannekoek, 2002a). Alberta Community Development built the museum in 1992, to house a donated collection of horse-drawn vehicles (ACD, 1998). The Centre's collection of 210 Victorian-era vehicles is one of North America's largest. The 65,000 square foot facility includes a theatre, state of the art displays in several presentation galleries, a restoration workshop that is open to public view, outdoor demonstrations of carriage use, along with a stable, gift shop and small cafeteria (Alberta Tourism, 1989).

Don Remington, a prominent Cardston resident, became fascinated with carriages in the 1950s, when he chaired the local Rotary Club's Santa Claus committee (Cardston and District Historical Society [CDHS], 1978-1987). Remington wanted to see Santa arrive in a traditional sleigh, rather than a motor vehicle. Remington and another local person located two cutters in British Columbia,

Figure 1.6. View of HSIBJ in the distance across the prairie.

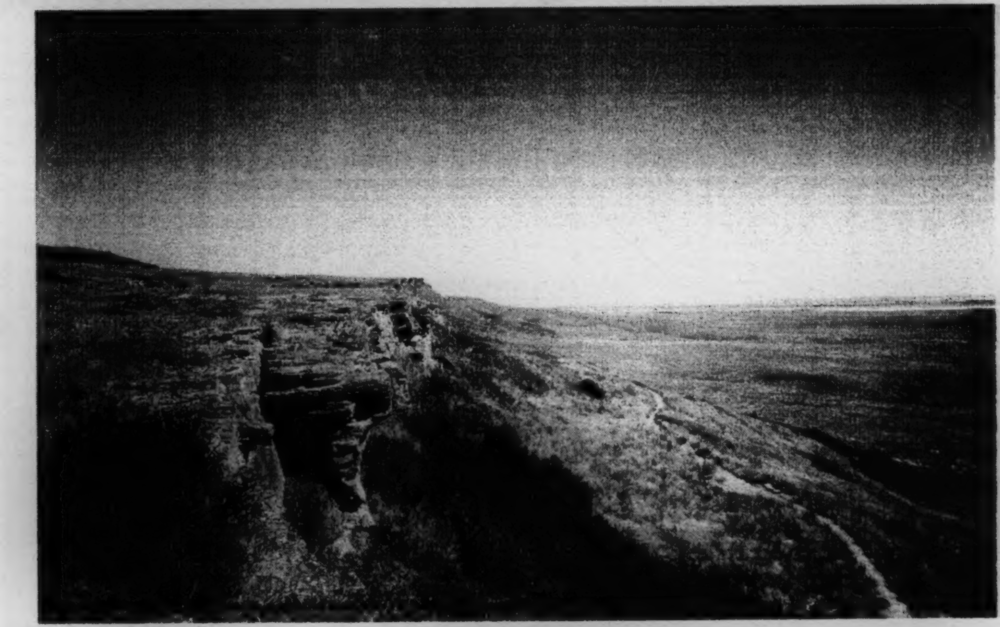

Figure 1.7. A view of the buffalo jump, seen from the viewpoint outside the top level of HSIBJ.

and brought them back to Cardston.[1] Mr. Remington spent many hours restoring his cutter. Early on, he also began to offer his carriages and coaches to friends and family for weddings. As his collection grew, Mr. Remington became heavily involved in the horse-drawn carriage community, acting as a director for the Carriage Association of America. He was frequently asked to provide carriages to governments, communities and church officials for a variety of historical events.

In 1985, Mr. Remington made an offer to donate his horse-drawn carriage and sleigh collection to the Province of Alberta, on the condition that they construct a facility in Cardston to accommodate it (CDHS, 1978-1987; Remington Carriage Collection Steering Committee [RCCSC], 1986). At the time of his donation, Mr. Remington's carriage collection was the only one in Alberta that was maintained in museum and operating condition (RCCSC, 1986). The collection included about 50 primarily pleasure class vehicles, built in the U.S. and Canada in the last half of the 19th century. Its appraised value was approximately one million dollars. Although Mr. Remington did not actively seek to develop a balanced collection, he did develop one with a significant variety of vehicles, including stagecoaches, drays, democrats, and a fire engine (CDHS, 1978-1987). However, it was not representative of all carriages used during that time period (RCCSC, 1986). That is, most of Mr. Remington's collection consisted of personal luxury or pleasure carriages, typically used by wealthier people. Related fieldwork photographs are provided in Figures 1.8 and 1.9.

Participants in the Initial Fieldwork

Table 1.1 provides details on types of participants at the three field sites. The table shows the site or sites with which each type of participant is associated. The column on the right describes the participants' main activities and their relationship to the interpretive centre.

In Table 1.1, I purposely include myself as a participant in the initial fieldwork. The qualitative research literature emphasizes the researcher's role as a participant in the research process (e.g., Hammersley & Atkinson, 1995; Mason,

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[1] Cutters are light, open, horse-drawn sleighs, which seat one or two passengers (Barber, 1998).

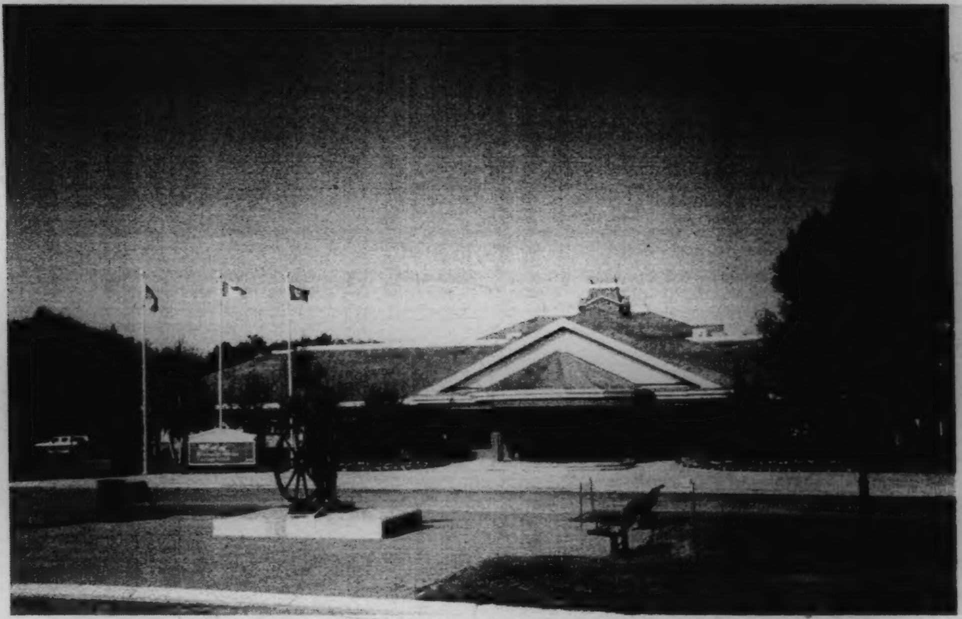

Figure 1.8. Statue of Don Remington in front of main entrance to RACC.

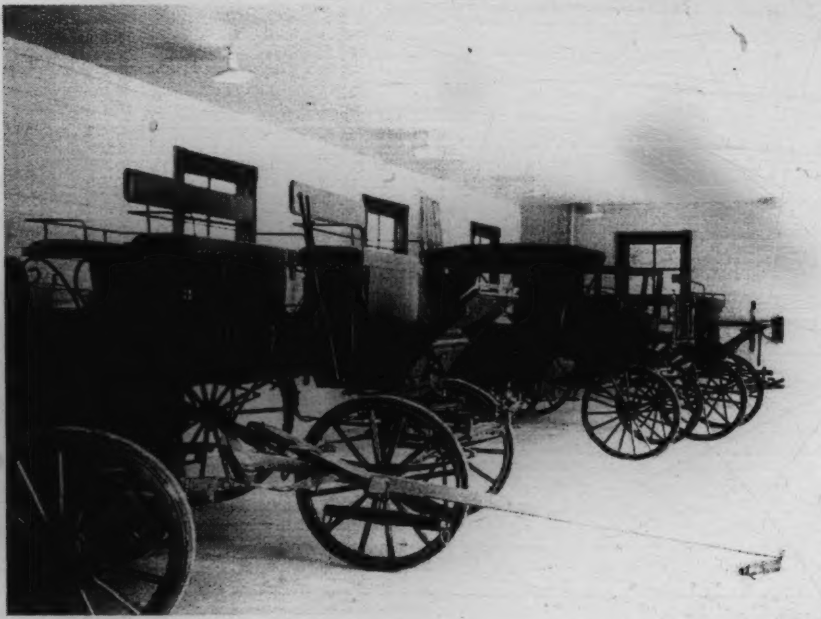

Figure 1.9. Carriages in coach house at RACC.

Table 1.1

Participants at the Field Sites

Participant	Site [1]	Number in Study	Description of Responsibility or Relationship to the Site
Regional Director	LRO	1	Liaised with ACD in Edmonton; coordinated activities of the three sites
Administrative Assistant	LRO	1	Provided administrative assistance to Regional Director
Marketing Officer	LRO	1	Coordinated marketing activities of the three sites
Media Officer	LRO	1	Provided technical assistance for region's media requirements
Facility Managers	all	1 at each site	Managed facility operations; responsible for programs and exhibits at their site
Friends Directors	all	1 at each site	Administered Friends Society activities and reported to the Friends Society Board; responsible for collection of admission fees, contracted with government for operations of facility; administered or contracted operations for gift shop and cafeteria; hired staff and handled payroll for non-government and/or contract employees
First-line Supervisors	all	3 to 4 at each site	Coordinated individual operational areas (e.g., cashiers, interpreters); (usually government employees)

Participant	Site [1]	Number in Study	Description of Responsibility or Relationship to the Site
Staff Members at Sites	all	varied seasonally	Performed operational tasks (e.g., cash desk, interpret exhibits) or staff functions (e.g., secretary to facility manager); position was allocated to the Friends Society or ACD; full-time or part-time; permanent or temporary
Advisory Board Members	all	8 to 10 at each site	Community members appointed to the Advisory Board by the Minister of Community Development; these volunteers advised the Minister on the facility's role (Facility manager and Regional director attended in nonvoting, informational capacity)
Friends Society Board Members	all	8 to 10 at each site	Board members elected from Friends Society membership, a non-profit organization established to support the facility; Since 1997, collected admission fees and contracted back to ACD to provide services (Facility Manager and Friends Director attend meetings in non-voting informational capacity)
Other Stakeholder Group Members	all	numerous	Members of various other stakeholder groups, identified in preliminary fieldwork (e.g., Ecomuseum Board Member at Site A; Native Elders at Site B; Cardston Chamber of Commerce marketing director at Site C)
Researcher	all & LRO	1	Researcher interacted with the other participants as part of their social world; an active participant in data creation

[1] *Note*. All = the three interpretive centres; LRO = Lethbridge Regional Office; Site A = Frank Slide Interpretive Centre; Site B = Head-Smashed-In Buffalo Jump; Site C = Remington-Alberta Carriage Centre.

1996; Patton, 1990). "The researcher is the "instrument": Her presence in the lives of the participants invited to be part of the study is fundamental to the paradigm. Whether that presence is sustained and intensive, as in long-term ethnographies, or whether relatively brief but personal, as in in-depth interview studies, the researcher enters into the lives of the participants." (Marshall & Rossman, 1995, p. 59).

At the beginning of the initial fieldwork, I was a `passive participant', with little direct interaction with most participants other than the facility managers (Spradley, 1980). However, by the end of the initial fieldwork, I had evolved into a role of moderate participation. I accompanied visitor tours of the centres, initiated conversations and informal interviews with employees, and attended Board meetings and other official functions. Although I did not assume employee duties, such as interpretation or administration, I performed several volunteer tasks at special events. Table 1.2 shows the time line for the dissertation, with approximate time periods and summaries of the main activities at each stage. The time line shows a progression from the initial fieldwork into explorations of the literature. It also presents the dissertation time line through analysis of illustrative interview data and completion of the dissertation. In the next section, I describe the data collection methods used during the initial fieldwork.

Data Collection in the Initial Fieldwork

The initial fieldwork included three methods of data collection: participant observation, semi-structured interviewing, and document and artifact analysis. These methods provided detail on issues and events surrounding the interactions between the sites and other actors. Table 1.3 shows a summary of example activities associated with each method, while Table 1.4 provides a summary of the data sources. Note that the initial fieldwork activities varied between sites, since certain activities or events were specific to one site. For example, I attended a powwow only at HSIBJ.

To obtain the desired background information, I toured the facilities alone or with groups of visitors, where I watched interpretive presentations and films, and studied the exhibits. I also reviewed documents (e.g., ACD's annual report, business

Table 1.2

Timeline for the Dissertation

Phase	Time Period	Main Activities
Preliminary	June 1998	Introductory visit to Acting Director in Lethbridge. Research proposal submitted to Acting Director of ACD's Southern Region.
Preliminary Fieldwork Phase	June to August 1998	Preliminary fieldwork.
Explorations with the Literature	August 1998 to August 2002	Explorations of the preliminary field data, and iterations between the data and literature.
Data Analysis	August 2002 to August 2004	Analysis of interview and field data.
Completion of Research	September 2004 to December 2005	Completion of dissertation.

Table 1.3

Summary of Data Collection Methods

Method	Sample Activities
Participant Observation	*At Site A*: Accompanied facility manager to potential historic building at original Hillcrest Mine disaster site; observed meetings of Advisory and Ecomuseum Boards; toured Bellevue Mine & Hillcrest Cemetery; participated in coffee break conversations; helped Friends Society director reorganize her office. *At Site B*: Accompanied facility manager on operational errands in Fort Macleod; observed pre-powwow reception, attended by corporate donors, native Elders, Friends and Advisory Board members; observed powwow grand entry; Observed interaction between native interpreters and visitors in educational room; Accompanied visitor tour through facility. *At Site C*: Attended luncheon for local business people; accompanied facility manager to marketing meeting in Waterton; volunteered at Remington Days; toured facility with small tour group; attended Volunteer Appreciation evening.
Unstructured Interviewing	*Preliminary Fieldwork*: Talked with facility managers informally in their offices, or in vehicles as we drove to meetings, other sites, or to complete operational errands; talked with Friends directors, usually in their offices; conversed with other employees informally in or nearby the facility, while they performed their tasks. (Temporary notes taken sometimes; field notes typed later in the day)
Semi-structured Interviewing	*Data Analysis Phase:* Secondary analysis of interviews with facility managers and Friends directors (audio taped and transcribed by research assistant).
Document and Artifact Analysis	*For three sites*: Looked at museum exhibits. Reviewed and analyzed facility business plans, department annual reports, minutes for Advisory and Friends Society Boards, web-pages, other selected marketing materials, bulletin boards in staff rooms, and so on. *At Site B:* Examined instructional artifacts in education room (traditional tools and small stuffed animals such as a weasel and a wolf.)

Table 1.4

Data Sources

Sources	Description
Temporary notes	Written in field or to summarize telephone conversations
Field notes	Typed in the evening after site visits
Interviews	*Informal*: Typed from notes *Formal semi-structured*: Transcribed from audio tapes
Documents	Notes on written information in or about the sites, added to field notes
Artifacts	Notes on artifacts in or around the sites, added to field notes

plans for the sites, Advisory Board minutes) and informally interviewed participants. I also helped with various activities, to reciprocate time and information with those who helped me (e.g., Hammersley & Atkinson, 1995). I performed volunteer activities at RACC's Remington Days, and spent one afternoon at FSIC helping the Friends director reorganize her office. I also provided photographs to FSIC's facility manager, to accompany a report on the buildings at the old Hillcrest Mine site.

My field notes were the primary data source for this initial fieldwork. Since I was conducting fieldwork in a politicized bureaucracy, I usually did not write any notes during my observations at the sites. Occasionally while I was observing or conducting informal interviews at the sites, I jotted temporary notes, usually of exact phrases or details I did not want to forget (Ellen, 1984). For example, I jotted notes while observing meetings, as did the active participants. My notes also summarized informal interviews, telephone calls and other contacts. I usually typed my field notes the same day as the field visit, to avoid loss of important detail. I described what I had observed during the field visit, including anything that I believed was significant (Patton, 1990). In fall 1998, after returning to Edmonton, I began to explore this descriptive material, as described in the next section.

Summary

To summarize, in the summer of 1998 I conducted initial fieldwork at three provincial historic sites in Southern Alberta. That fieldwork was designed to familiarize myself with the three sites, but more specifically to observe the facility managers' interactions with key community stakeholders. To accomplish this, I participated in both formal and informal activities at each site, including attendance at board meetings and special events, and conversations with staff. I also examined relevant documents, such as divisional literature. Most importantly, I kept daily field notes of my observations and conversations at the sites. In the next section, I describe my exploration of this initial field material.

Exploration of the Initial Field Material

In the fall of 1998, I began to explore the initial field material. Focusing on the descriptions of interactions between the sites and their community stakeholders, I identified recurring themes or issues related to those interactions. The material showed that the managers were struggling to adjust their activities to their new, complex environment. In particular, they struggled with issues of process, such as how to identify potential partners, and how to develop autonomous linkages.

As I explored my field material, I also developed the strong belief that the sites were social actors (e.g., Cohen, 1968; Crozier & Friedberg, 1995), with unique organizational identities (Albert & Whetten, 1985). I had heard various faculty members and fellow doctoral students discuss their own research on professional or organizational identity, and as I began to explore my initial field material, I was drawn to the explanatory power of this concept. Organizational identity has recently emerged as an important topic in organization studies (Albert, 1998). It is typically defined as that which is fundamental and distinctive about that organization in the view of its members (Albert & Whetten, 1985). In a later paper, Dutton and Dukerich (1991) introduced image as a related concept, meaning the view that members believe others hold about their organization.

I knew that each site had unique attributes or central characteristics. I also believed that each site's unique identity was jointly constructed through interactions with the actors in its external environment, including its community stakeholders. The site's identity then influenced the structure of its current and potential interorganizational relations. Drawing on my observations and conversations during my field research, I saw the site's identity as similar to a ghost, an unseen presence that provided a backdrop for the facility manager. I believed other actors might confuse the site's identity with the manager's role. This confusion would influence how the facility manager could deal with the interorganizational relations of his or her facility. That is, the site's identity would impinge on its IO interactions.

The Sites as Social Actors with Unique Identities

I wanted to select names for each of the three sites that would encapsulate my understanding of their organizational identity, and characterize their interactions with other actors in their interorganizational network. To begin, I brainstormed ideas with members of the research team who also were familiar with the three sites. After returning to my field notes, I finally settled on three names that I believed best summed up my understanding of the site's identity, and helped me to develop an understanding of its interorganizational relations: The Pretender (Frank Slide Interpretive Centre), The Trickster (Head-Smashed-In Buffalo Jump), and The Deceiver (Remington-Alberta Carriage Centre). Thus, these names effectively operated as labels or shorthand for my interpretation of each site's organizational identity. Table 1.5 shows the analysis of the social actor names and their synonyms, while Table 1.6 provides a brief description of that name and identity for each of the three Southern Alberta sites. I reaffirmed my selection of these three names through discussions with the research team.

Summary

Upon exploring the initial field material, I began to believe that the three historic sites were collective social actors with unique organizational identities. As collective social actors, the three historic sites were also oriented toward the behaviour of other actors in their external environments, such as their community stakeholders. I argued that we could understand the identity of each site through the use of a representative name. I understood FSIC as a social actor called The Pretender, because I believed the site presumed to speak for the region. However, it represented a history that its community neither valued nor wished to preserve. I called HSIBJ the Trickster, to represent my understanding of its ambiguous nature as a social actor that acted as a culture hero for the Blackfoot people, yet one that also profited off that culture, sometimes over the objections of the people it represented. Finally, I understood RACC as a collective actor called The Deceiver, because it had disappointed the economic hopes of the local community, with its inability to meet the promised visitation projections. My exploration of the initial field material led

Table 1.5

Development of Social Actor Names

Frank Slide Interpretive Centre

The Pretender
n. 1. A person who claims a throne or title etc.
2. A person who pretends

Synonyms for `pretender:
claimant, claimer, aspirant

Definitions for those synonyms:
claimant - *n.* a person making a claim, esp. in a lawsuit or for a government benefit.
claimer - *n.* 1. a person who makes a claim. 2. a claiming race*. 3. a horse entered in a claiming race, esp. frequently because the owner no longer wants it.
aspirant - *adj.* aspiring. *n.* a person who aspires **.

* claiming race - *n.* a horse race at which every horse participating is for sale at a stipulated price.
** aspire - 1. have ambition or strong desire (aspired to be prime minister). 2. *archaic* rise high.

pretend
tr. profess, esp. falsely or extravagantly
intr. (pretend to); lay claim to (a right or title etc.); profess to have (a quality etc.)
tr. (pretend to); aspire or presume; venture

Head-Smashed-In Buffalo Jump

The Trickster
n. 1 a person who enjoys playing pranks and practical jokes on others; a joker.
2 a person who deceives others for esp. financial or political gain; a fraud or cheat.

Or

"A mischievous supernatural being much given to capricious acts of sly deception, found in the folklore of various preliterate peoples, often functioning as a culture hero, or one that symbolizes the ideal of a people." (Merriam-Webster, 1995, p. 1130).

Synonyms for `Trickster':

cheat, swindler, fraud, fraudster, defrauder, confidence man, deceiver, deluder, dissembler, hoodwinker, hoaxer, phoney, charlatan, rogue, scoundrel; con man.

Definitions for those synonyms:

cheat - a person who cheats; a trick, fraud or deception; an act of cheating
swindler - extravagant maker of schemes
fraud - a person or thing is not what it is claimed or expected to be; a dishonest trick or stratagem
fraudster - a person who commits fraud, esp. in business dealings
defrauder - (person who) takes or withholds rightful property, status, etc. from (a person) by fraud; cheat
confidence man/woman - a man who robs by means of a confidence game (a swindle in which the victim is persuade to trust the swindler in some way)
deceiver - person who misleads purposely; uses deceit; (archaic) disappoint (esp. hopes)
deluder - (a person who) deceives or misleads
dissembler - (to dissemble: 1. conceal one's motives; talk or act hypocritically. 2. a. disguise or conceal (a feeling, intention, act, etc.). b simulate (*dissembled grief in public*).)
hoodwinker - deceiver, deluder
hoaxer - (hoax: *n*. a humorous or malicious deception; a practical joke. *v.tr.* deceive (a person with a hoax.
phoney - sham, counterfeit, fake; insincere
charlatan - a person falsely claiming a special knowledge or skill
rogue - a dishonest or unprincipled person; a mischievous person, esp. A child; a stray, irresponsible, or undisciplined person or thing; an inferior or defective specimen among many acceptable ones
scoundrel - a person who shows no moral principles or conscience.
con man - confidence man

Remington Alberta Carriage Centre

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the Deceiver -
person who misleads purposely; uses deceit; (archaic) disappoint (esp. hopes)

Synonyms for `deceive':

mislead, delude, fool, misguide, trick, hoodwink, hoax, dupe, swindle, outwit, bamboozle, seduce, ensnare, entrap, beguile, betray

Definitions for those synonyms:

mislead - cause (a person) to have a wrong idea or impression about something; archaic lead in the wrong direction
delude - deceive or mislead
fool - deceive so as to cause to appear foolish; trick, cause to do something foolish; play tricks on, joke; act in a joking, frivolous, or foolish way
misguide - mislead, misdirect
trick - deceive by a trick, outwit; lure or induce by trickery, fool; cheat, defraud, cause (a person) to relinquish or lose something by deceitful means
hoodwink - deceive, delude
hoax - deceive (a person) with a hoax (a humorous or malicious deception; a practical joke)
dupe - deceive, mislead, make a dupe of (a person who is deluded or deceived by another)
swindle - cheat (a person) of money, possessions, etc; cheat a person of (money etc.)
outwit - be too clever or crafty for; deceive by greater ingenuity
bamboozle - cheat, deceive, swindle; mystify, perplex
seduce - tempt or entice into sexual activity; tempt, lure; lead astray; beguile
ensnare - entrap, entangle in difficulties, or catch in or as in a snare
entrap- catch in or as in a trap; beguile or trick (a person)
beguile - charm, amuse; divert attention pleasantly from; delude, cheat
betray - place (a person, one-s country, etc.) In the hands or power of an enemy; be disloyal to (another person, a person's trust, etc.); reveal involuntarily or treacherously; be evidence of; lead astray or into error

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Note: Synonyms are taken from The Oxford Paperback Thesaurus (Kirkpatrick, 1994). This is a synonym-of thesaurus, which lists the most common synonyms first. Definitions of words are from *The Canadian Oxford Dictionary* (Barber, 1998). I included only the definitions that I judged to be appropriate.

Table 1.6

Social Actor Descriptions for the Three Historic Sites in Southern Alberta

Site	Social Actor Description
	"The Pretender"
Frank Slide Interpretive Centre	*pretender*: "a person who claims a throne or title" *pretend to*: "lay claim to (a right or title etc.)"; "profess to have (a quality etc.); "aspire or presume; venture" (Barber, 1998, p. 1146).
	"The Trickster"
Head-Smashed-In Buffalo Jump	"a figure in Native mythology"; "A mischievous supernatural being much given to capricious acts of sly deception, . . . often functioning as a culture hero, or one who symbolizes the idea of a people." (Merriam-Webster, 1995, p. 1130).
	"The Deceiver"
Remington-Alberta Carriage Centre	*to deceive*: "make (a person) believe what is false; mislead purposely); disappoint (especially hopes)" (archaic meaning) *deceive oneself*: persist in a mistaken belief (Barber, 1998, p. 362).

Sources:

Barber, K. (Ed.). (1998). *The Canadian Oxford dictionary.* Toronto, ON: Oxford University Press.

Merriam-Webster. (1995). *Merriam-Webster's encyclopedia of literature.* Springfield, Massachusetts: Merriam-Webster Incorporated.

me to believe that the sites developed this identity through interorganizational interactions, and that this identity also affected its future IO interactions.

Chapter Summary

To summarize, my exploration of the initial field material revealed recurring questions about the processes involved in managing interorganizational relations. The field material also suggested that each historic site had a unique organizational identity, jointly constructed through interactions with their interorganizational environment. The concept of organizational identity allows us to understand the sites as social actors, jointly constructing their identity through interactions with their environment.

This first chapter has provided an introduction to the dissertation, through an overview of interorganizational theory, a discussion of the study's purpose and delimitations, a description of my initial field research and the research setting, and discussion of the three organizations as social actors. In the following chapters, I explore several theoretical approaches for additional understanding of IORs, resulting in my development of a conceptual framework, as shown in Figure 1.10. In Chapter Two I explore three mainstream, content-oriented theories for understanding interorganizational theory. Chapter Three summarizes my exploration of alternative, process-oriented approaches to interorganizational theory. Based on that exploration, I describe how I developed and attempted to apply an enactment-based conceptual framework, using both sensemaking and actor-network theory. However, as a result of that work, I became convinced that organizational identity was the key to understanding interorganizational processes.

Therefore, Chapter Four continues with presentation of a conceptual framework for understanding the role of identity in crucial interorganizational dynamics. The chapter closes with a description of narrative analysis. This analytic technique allows me to understand how the site's identity is constructed as the manager tells stories to make sense of interorganizational events.

In Chapter Five, the dissertation turns to an illustration of the conceptual framework developed in Chapter Four. Specifically, Chapter Five focuses on the

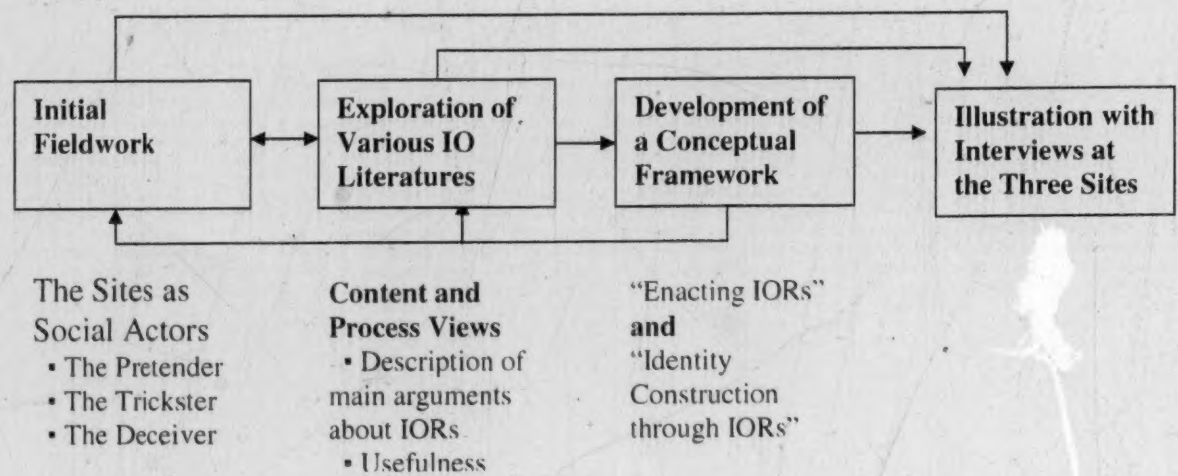
Initial Fieldwork
Exploration of Various IO Literatures
Development of a Conceptual Framework
Illustration with Interviews at the Three Sites
The Sites as Social Actors
• The Pretender
• The Trickster
• The Deceiver
Content and Process Views
• Description of main arguments about IORs
• Usefulness
"Enacting IORs"
and
"Identity Construction through IORs"

Figure 1.10. Structure of the dissertation.

Frank Slide Interpretive Centre, while Chapters Six and Seven respectively focus on Head-Smashed-In Buffalo Jump and Remington-Alberta Carriage Centre. Finally, Chapter Eight presents my conclusions.

Chapter Two

Exploring Content Approaches to Interorganizational Relations

> "Man is an animal suspended in webs of significance he himself has spun. . . " (Geertz, 1973, p. 5).

This chapter describes my study of the content-oriented literature on interorganizational relations. After the conclusion of my initial fieldwork, I turned to the literature to explore various questions that I now had about the IORs at my field research sites. In particular, I wanted to understand how the facility managers at the three sites might identify potential IO partners within the external environment. Similarly, I wanted to understand what factors would contribute to formation of successful IORs at each site, and what factors might hinder it. Finally, I wanted to learn what theory said about the role of social action and organizational identity in IORs.

Thus, in this chapter I describe my exploration of three mainstream, content-based approaches for studying interorganizational relations: resource dependence theory, institutional theory and stakeholder theory. I hoped resource dependence theory would provide an analysis of the power imbalances I had observed between the facility and the other actors in its environment. I also turned to the institutional theory literature, seeking a broader social analysis than that provided by resource dependence theory. I believed that current trends in the broader economic and political environments had led to changes in Alberta's public sector environment. That is, recent demands for government accountability and fiscal responsibility meant that the facilities needed to develop successful IORs with their community stakeholders. I also chose to explore stakeholder theory, because I already had a basic understanding of its main arguments and assumptions. Several years earlier, I had used stakeholder theory in the teaching notes for my strategic management case on the Canadian Red Cross Society (Loewen, 1998). Stakeholder theory attracted me because I wanted to understand how the facility managers determined which external groups were most important to their site.

In the three sections that follow, I describe the main characteristics of these three mainstream content-based frameworks for IORs, and their key advantages and disadvantages. Table 2.1 also summarizes the main characteristics of each framework, including its major arguments about why and how organizations form IORs. I begin with an overview of the resource dependence literature.

Resource Dependence Theory

Resource dependence theory (RDT; Pfeffer & Salancik, 1978) is an important, early theoretical framework for studying interorganizational relationships (Galaskiewicz, 1985). Indeed, until recently RDT dominated the empirical IO literature, as the most popular analytic approach for understanding IORs (Sydow, 2002). In RDT research, the organization is the level of analysis. However, the unit of analysis may be the focal organization, an interorganizational linkage of that organization, or the specific interdependencies between the focal organization and other organizations (Auster, 1994).

Historically, RDT shows strong influences from two theoretical areas (Hall, 1991). First, the political-economy approach focuses on the power that organizations derive from interorganizational interactions (Benson, 1975). Second, according to the dependence-exchange approach, resource exchanges between organizations create dependencies (e.g., Jacobs, 1974). If these dependencies are asymmetric and involve crucial resources, they create vulnerabilities (Emerson, 1962). That is, when an organization is dependent upon another for access to critical resources, a power differential develops. This is a phenomenon that Emerson called `power-dependence'.

The RDT perspective assumes that all organizations engage in regular exchanges of inputs and outputs with an external environment that consists of other organizations (Davis & Powell, 1990; Pfeffer & Salancik, 1978). No organization is completely self-sufficient, and interdependence among organizations is "virtually inevitable" (Miner, 2002, p. 765). To attain the resources necessary for survival, such as raw materials, knowledge, people and capital, an organization must enter into exchanges with its interorganizational environment (e.g., Barringer & Harrison; Hall,

Table 2.1

Selected Content Approaches for Research on Interorganizational Relations

Basis of Comparison	Resource Dependence Theory	Institutional Theory	Stakeholder Theory
Main question the framework seeks to answer	Why are some organizations dependent on others?	Why are organizations similar?	What are the moral or social responsibilities of organizations?
Key assumptions	- realist ontology - rational actors - organizations are open systems	- social constructionist ontology - actors guided by myth, culture, norms - environment is institutional, taken-for-granted rules & structures	- realist ontology - rational actors - organizations can identify their stakeholders, adjust activities to stakeholder interests
Level of analysis	Focal organization and its interorganizational partner(s)	Organizational field	Focal organization and its network of stakeholder groups

Outline of basic argument	- organizations are dependent on other organizations for resources - this dependence leads to uncertainty - managers can manage these interdependencies	- organizations become isomorphic in form (structure, practices) to gain legitimacy, assure survival through access to resources - formal organizational form may be decoupled from actual form - institutionalization process explains why organizations become similar, or how institutions develop	- organizations have an ethical obligation to stakeholders - stakeholders are all groups that have an interest in the organization's activities - organizations can adjust strategic activities to meet stakeholder interests - managers can assess relative important of stakeholders, based on criteria such as power, legitimacy & urgency
Major Arguments:			
Why do organizations form IORs?	To reduce environmental uncertainty	To conform to institutionalized practices	To help meet its responsibilities to stakeholder groups
How do organizations form IORs?	Not emphasized.	Not specifically addressed.	Not specifically addressed.
How are IORs managed/maintained?	Retain autonomy & reduce power-dependence of other actors, through mergers or board directorate interlocks	Not specifically addressed.	Through appropriate operating procedures.

Limitations of the framework	- lacks theoretical complexity - ignores social issues, broader environment	- ignores human agency - neglects power & resistance - assumes consensus, conformity	- needs further development - neglects organizational identity - no guidance on managing multiple, conflicting stakeholder interests

1991; Klijn, 1997). The greater this external reliance, the greater the uncertainty experienced by the organization's decision-makers (Thompson, 2003).

If certain resources are both critical and scarce, with few alternative sources or substitutes, the organization will develop an asymmetric dependency on the organizations that control those resources (Pfeffer & Salancik, 1978). As Emerson (1962) suggested, when one organization is dependent on another organization, it is less powerful than that other organization. As a result, it loses some of its autonomy. Thus, RDT suggests that managers would wish to avoid forming asymmetric IORs that will limit the organization's decision-making autonomy (Monge & Contractor, 2000). From the RDT perspective then, organizations experience a conflict between the need to decrease uncertainty of access to resources, yet remain autonomous from other organizations (Davis & Powell, 1990).

It is important to actively manage IO dependencies, because the demands of powerful external entities may eventually threaten the organization's long-term survival (Miner, 2002). Put simply, an organization will either try to decrease its own dependence on other organizations for key resources, or try to make other organizations dependent on it for access to important resources (Auster, 1994; Barringer & Harrison, 2000). That is, organizations will try to increase their own autonomy, while decreasing the autonomy of other organizations (Cook, 1977; Pfeffer & Salancik, 1978). RDT also suggests that managers do not simply comply with external demands, but employ specific tactics to cope with them (Aldrich & Pfeffer, 1976; Hall, 1991; Pfeffer, 1982). Indeed, RDT "portrays the organization as active, and capable of changing, as well as responding to, the environment." (Aldrich & Pfeffer, 1976, p. 83). This is important, because it suggests that management of the environment is at least as important as management of the organization itself (Pfeffer, 1976, cited in Aldrich & Pfeffer, 1976).

Several management tactics are undertaken to acquire resources and stabilize the organization's interactions with external actors (Aldrich & Pfeffer, 1976). Managers may form IORs to `buffer' the organization from environmental uncertainty and to cope with resource dependencies (Monge & Contractor, 2000;

Pfeffer & Salancik, 1978). For example, an organization's managers can initiate additional IO interactions or exchanges to improve access to resources (Pfeffer & Salancik, 1976). Based on their analysis of data from the 1960s, Pfeffer and Nowak (1976) found that U.S. oil and gas organizations tended to form joint ventures to manage their resource interdependencies with each other. As an alternative tactic, managers may initiate a merger with another organization, to manage resource interdependencies or competition for the same resources (e.g., Pfeffer, 1972). For example, Campling and Michelson (1998) described how two British broadcasting and film unions formed a merger in 1991, to reduce competition for new members and their associated dues. The merger also reduced their external resource dependencies and enhanced the likelihood of their long-term survival. Using another tactic, managers may formalize the interlocking of board directorates with an asymmetric interorganizational partner or competitor, thus using co-optation to manage resource interdependencies or environmental uncertainty (Pfeffer, 1973; Pfeffer & Salancik, 1978). For example, Lang and Lockhart (1990) studied the effects of industry deregulation on board interlinkages among airlines. They found that airlines developed interlocking boards with their direct competitors, because it allowed them to cope with a turbulent industry environment through informal coordination of their activities.

According to RDT, managers also exercise choice by `enacting' the external environment (Weick, 1969; 1979). That is, Pfeffer and Salancik (1978) argued that managers retrospectively create an understanding or perception of the interorganizational environment. This perception influences their future actions, including their choice of IO exchange partners, and their tactics for managing resource dependencies. If managers `successfully' enact their organization's external environment, they will be able to access critical resources, without entering into asymmetric dependencies with any IO partners (Pfeffer & Salancik, 1978). Thus, they will preserve the organization's autonomy and reduce the environmental uncertainty that they face (Pfeffer & Salancik, 1978).

However, RDT also suggests that managers may encounter problems as they try to enact the organization's external environment. For example, managers may overlook or ignore important aspects of the interorganizational environment, and enact an `incorrect' IO environment (Pfeffer & Salancik, 1978). More specifically, managers may develop inaccurate perceptions of the organization's resource dependencies, including the demands of key external actors (Miner, 2002). Similarly, they may misinterpret the complexities of other IO relationships within that external environment.

Three of the key concepts in RDT, described earlier in this section, effectively serve as themes within the empirical RDT literature. The first and most common theme is that of dependence or interdependence among organizational actors. Thus, various authors have studied the resource dependencies among two or more actors. Campling and Michelson's (1998) study of union mergers in the British and Australian broadcasting and film industries, described earlier in this section, fits within this stream of research. Similarly, Saidel (1991) found a symmetrical interdependency among nonprofit organizations and state agencies in New York, as they worked together to provide services to the public in four different areas (e.g., developmental disabilities, arts). A related stream of RDT research focuses on the autonomy of an organization involved in one or more IORs. For example, Zinn, Proenca and Rosko (1997) found that nonprofit hospitals with substantially greater financial resources acted to retain autonomy in their management-oriented IOR. Thus, hospitals that made greater profits were more likely to manage the hospital through an alliance-based IOR, avoiding a less autonomous, contract-based IOR.

The second theme, typically found less explicitly in the more recent RDT literature, focused on resource exchanges or transactions among IO partners. For example, Goes and Park (1997) conducted a decade-long study of over 400 hospitals in California. These authors found support for their position that cooperative IORs enhance organizational innovation through opportunities for resource exchanges and learning. Similarly, Keister (1999) studied interorganizational exchanges of resources among 535 firms in China's 40 largest business groups, finding support for the basic arguments of resource dependence theory. For example, this study suggested that an IOR became weakened when the receiving IO partner was able to function without the resource, particularly in an uncertain environment.

Finally, the third theme identified in the empirical RDT literature focused on power relationships among IO partners. For example, Provan, Beyer and Kruytbosch (1980) studied power relationships in an IO network comprised of a United Way organization and 46 of its member agencies. The authors found a complex relationship between the member agency's type of power and its other environmental linkages. For example, agencies with high potential power, defined as high net resource dependence, were more successful in attaining financial resources from the United Way if they had many joint programs (i.e., IORs) with other service agencies.

Assessment of Resource Dependence Theory

The RDT approach holds several advantages for studying interorganizational relationships, as suggested by its popularity as a research framework (Davis & Powell, 1990; Reitan, 1998). The framework has an attractive logic and simplicity, focussing on resource attainment, an important organizational activity (Hall, 1991; Reitan, 1998). Indeed, Barringer and Harrison (2000) argued that resource dependence theory provides a strong explanation for understanding why organizations enter into IORs. Reitan (1998) argues that the RDT framework also allows an analysis of change. That is, in her view, we can use RDT to explain how organizations try to change their environment, and how interorganizational partnerships may change in direction or intensity.

However, we can also outline several important disadvantages of the RDT approach to understanding IORs. First, confusion remains about what drives management interactions with the interorganizational environment – efforts to reduce environmental uncertainty, or to increase organizational autonomy (Davis & Powell, 1990; Nohria & Gulati, 1994). As Galaskiewicz (1985) suggested, "This gives rise to an interesting caricature of the reluctant organization striving to maintain its independence from others, while knowing that it must engage in interorganizational relations in order to procure the resources it needs." (p. 282).

Second, many authors have criticized RDT for its lack of theoretical complexity (e.g., Barringer & Harrison, 2000). Indeed, both Reitan (1998) and Meyer, Boli and Thomas (1987) criticized RDT for its narrow focus on the strategic, competitive calculations of a focal organization, one that acts only in its own interests within an external environment that consists of both resources and constraints. This is important, because it means that RDT does not explain important IO processes, such as *how* organizations approach others to undertake a resource exchange (Barringer & Harrison, 2000). It also does not suggest whether organizations consider key factors, such as the legitimacy of a potential exchange partner, when developing an IOR. RDT also provides little insight on the organization's broader external environment (Reitan, 1998). RDT and other exchange-oriented frameworks assume that the environment is "culturally vacuous", merely "a set of raw resources, opportunities, or constraints." (Meyer et al., 1987, p. 18). Thus, RDT downplays the importance of key environmental constraints on managerial decision-making, which originate in the broader institutional environment (Reitan, 1998). For example, Galaskiewicz (1985) argued that RDT does not adequately consider external constraints on managerial decision-making, such as laws embedded within the institutional environment. At the same time, RDT tends to ignore how IORs might contribute to the attainment of broader societal goals (Reitan, 1998).

Third, RDT ignores the role of goals in managerial decision-making (Hall, 1991). Instead, management choice among alternatives is constrained by both the organization's internal power structures and the demands of external actors. Miner (2002) argued that Pfeffer and Salancik (1978) could have improved RDT's power, if they had included organizational goals as internal constraints on organizational decision-making. This is an important criticism, because when we ignore organizational goals, it becomes difficult to reconcile the RDT approach with the view that organizations are *collective* social actors, with a unique set of goals or interests.

Finally, although some empirical support has been found for RDT, several key parts of the theory have never been studied empirically (Miner, 2002; Sydow, 2002). For example, little RDT research has looked at how resource changes in the external environment might alter the external constraints on managerial action, and thus change power-dependency in IO relations (Galaskiewicz, 1985). Also, some research has not supported key RDT principles. For example, Oliver (1991) found that organizations did not avoid certain types of IO relationships, such as written contracts, which would likely reduce their overall autonomy. Similarly, in a replication and extension of Pfeffer (1972), Finkelstein (1997) concluded that RDT might not provide a robust explanation for why organizations merge across industry boundaries. Pfeffer (1972) had found that manufacturing firms were significantly more likely to merge with firms from other industries, when a high proportion of resource exchanges had occurred across those industry boundaries. That is, manufacturing firms would reduce their resource dependence on firms in other industries through mergers with those firms. However, using more precise statistical analyses, Finkelstein (1997) found that resource dependence accounted for only a small amount of the variance in interindustry mergers over a 45 year period.

Summary

The RDT framework has a simple, attractive logic, with a strong explanation for why organizations form IORs. However, key parts of the framework either have not been studied empirically, or have not received empirical support. The RDT framework also tends to ignore the broader external environment, ignoring the interplay between the organization and its institutional environment. Most importantly, RDT does not explain important IO processes, such as how organizations initiate an IOR. As described in the next section, institutional theory provides a broader, alternative perspective for understanding IORs.

Institutional Theory

Institutional theory, or neo-institutional theory, is an important perspective in current organization theory, which began to dominate the organizational literature in the 1980s (Hall, 1991; Hirsch & Lounsbury, 1997; Miner, 2002). The origins of new institutional theory can be linked to Philip Selznick's work from the 1940s and 1950s (Nohria & Gulati, 1994). Selznick argued that organizational practices became institutionalized when they took on meaning or value over and above that of the actual task. However, we can trace the actual beginnings of neo-institutional theory, hereafter referred to as `institutional theory', to Meyer and Rowan's (1977) frequently cited article.

Historically, institutional theory is rooted in several basic disciplines, including economics, political science and interpretive sociology (Scott, 1995a). Perhaps because of these diverse influences, the institutional theory literature is diverse in its assumptions and preferred topics. In fact, we can identify at least two general streams of research within this perspective (Bluedorn, Johnson, Cartwright & Barringer, 1994; Hall, 1991; Miner, 2002). The first stream of work, associated with Zucker (e.g., 1977), Meyer (e.g., Meyer & Rowan, 1977) and Scott (e.g., Meyer, Scott & Deal, 1981), emphasizes the process of institutionalization, or the microprocesses through which shared meanings develop (Bluedorn, et al., 1994; Hall, 1991). In particular, they attempt to explain how ongoing interactions will lead to legitimate organizational forms. In contrast, another stream of work that is associated mainly with DiMaggio and Powell (1983) focuses on how institutionalized practices, through coercive and normative pressures, encourage organizational isomorphism (Hall, 1991).

Despite the existence of these alternative research streams, we can identify certain key assumptions and concepts that are common in most versions of institutional theory (Davis & Powell, 1990; Hall, 1991). First, in the institutional approach, actors are embedded in institutional environments, consisting of taken-for-granted rules and structures (Meyer & Rowan, 1977). These institutionalized beliefs determine the actions and interactions of actors within a common environment

(Abell, 1995). Therefore, institutional theory views organizations as abstract entities, created through institutionalized myths or rules (Reitan, 1998). Thus, institutional theory differs from RDT in its prevailing theory of social action. From an institutional standpoint, human behaviour is not intentional (DiMaggio & Powell, 1991). Instead, institutional theory focuses on how unconscious thinking and schema become *practical action*, or taken-for-granted, habitual action. Indeed, this practical action is more powerful than the calculative or rational dimensions of behaviour, according to institutional theorists. From this perspective, macro-level social institutions construct the interests and means of social actors.

Second, the basic unit of analysis is the organizational field, defined as "socially constructed communities composed of similar organizations that are responsible for a definable area of institutional life." (Powell, 1998, p. 301). This organizational field is similar to an action set, described in Chapter One. However, it emphasizes the effects of broader sociocultural and historical structures on IORs. It includes a diverse group of organizations, including suppliers, customers, regulatory bodies, competitors, and labour and professional associations (Powell, 1998; Scott, 1983). They develop through a four-part process of `structuration' or definition of the institutional field (DiMaggio, 1982, cited in DiMaggio & Powell, 1983). Those four parts of the structuration process include: more frequent interaction of the relevant organizations; appearance of distinct structures, such as dominant members and coalitions; increased flows of information to all the organizations; and the joint awareness among the organizations within the field that they share common pursuits.

Third, the process of institutionalization is another important concept within this perspective (Davis & Powell, 1990). Indeed, Reitan (1998) argued that the main aim of institutional theory is to describe this process at various levels of analysis. Here, institutional theorists begin to diverge in their approach (Hall, 1991). For example, some theorists view institutionalization primarily as a `bottom up' process, in which individual actors socially construct institutionalized practices and beliefs (e.g., Meyer & Scott, 1983; Zucker, 1977). "The focus is on ways in which practices and patterns are given values and how interaction patterns and structures are legitimated." (Hall, 1991, p. 289).

This stream of institutional theory is influenced by the work of Berger and Luckmann (1966) and other phenomenologists (Nohria & Gulati, 1994). Berger and Luckmann argued that human reality is socially constructed through the continuous interactions of individuals. Using a similar argument, Meyer and Rowan (1977) suggested that `rationalized myths' developed through the institutionalization of repetitive organizational practices. These rationalized myths are ". . . rational in that they specify in a rulelike way how certain activities are to be conducted to achieve a given objective; mythical in that the rules "work" because, and only to the extent that, they rest on widely shared beliefs." (Scott, 1990, p. 46).

In an alternative conceptualization of institutionalization, other theorists (e.g., DiMaggio & Powell, 1983) emphasize the influence of institutions on organizations and organizational fields. From this perspective, the broader cultural and social environments, along with the economic and technological environments, influence an organization's activities (Nohria & Gulati, 1994). Thus, organizations reflect the institutionalized rules and structures of their institutionalized environment (Reitan, 1998). As a result, organizations tend to become isomorphic. Specifically, they adopt similar structures, strategies and other processes, even if they are unnecessary for efficient attainment of organizational goals.

According to DiMaggio and Powell (1983), three types of institutional pressures – coercive, normative and mimetic – encourage isomorphism in organizational forms and practices. For example, coercive pressures, such as laws and regulations, require organizations to adopt standard forms and practices (Hall, 1991). Normative pressures from professional groups also contribute to institutional isomorphism. That is, managers in a particular field tend to develop homogeneous managerial ideas through their professional training and involvement in professional associations.

Mimetic pressures for isomorphism arise from the perceived need to reduce environmental uncertainty (DiMaggio & Powell, 1983). Essentially, organizations respond to environmental uncertainty by imitating the actions of successful organizations within their field (Hall, 1991). They do this to appear legitimate, and thus gain access to necessary resources. Thus, managers will incorporate new organizational forms and practices, regardless of their usefulness (Hall, 1991; Reitan, 1998). That is, organizations will mimic the practices or forms of other organizations to enhance their legitimacy.

More specifically, organizations may form IORs to appear legitimate, and thus gain access to the necessary technical resources (Barringer & Harrison, 2000; Sydow, 2002). Essentially, organizations will try to develop IORs with reputable partners. When they do this, they show the organization's acceptance of broader belief systems, and it allows them to access the resources necessary for survival (Barringer & Harrison, 2000; Scott, 1995a). For example, in some industries organizations will form IORs simply because most other organizations have done so (Barringer & Harrison, 2000). As another example, a small organization might increase its legitimacy through an IOR with a larger, more prestigious one. Alternatively, managers could align the organization with important external cultural symbols or other actors that legitimately hold power (Galaskiewicz, 1985). For example, managers might recruit powerful people to the organization's board of directors, and organizations might seek endorsements from powerful political actors.

Eventually, these adopted organizational practices become institutionalized, or taken-for-granted (DiMaggio & Powell, 1983). That is, society develops norms or expectations about the organizational structures and practices that are most appropriate (Meyer & Scott, 1983). These norms are myths, which are unlikely to improve an organization's effectiveness. Instead, they simply reflect the organization's broader institutional environment.

My review of the recent empirical institutional theory literature led me to identify three overall themes. The first two themes are based on key concepts within institutional theory. Institutionalization of ideas and practices is the first and most commonly used concept within the empirical literature. For example, Bordt (1997) used organizational institutional theory to describe the emergence, institutionalization and eventual deinstitutionalization of feminist collectives in the United States. Legitimacy is a second common concept that forms a common theme in the empirical institutional theory literature. For example, Deephouse (1996) found that U.S. commercial banks using similar or isomorphic strategies were viewed as more legitimate by the media and industry regulators.

Change-related topics, such as diffusion of innovative forms or practices, form the third theme in the empirical institutional theory literature. For example, Haveman (1993) drew on population ecology to argue that competition among firms explains why new organizational forms develop within an institutional field. More specifically, based on her research in the recently deregulated U.S. savings and loan industry, Haveman suggested that organizations will alter their form to mimic a successful competitor. As a second example, Arndt and Bigelow (2000) studied justification of new organizational forms within an institutionalized, healthcare environment. These authors found that hospital CEOs frequently used impression management techniques in their annual reports, citing specific and real coercive or mimetic pressures that necessitated adoption of a new organizational structure outside the institutionalized norm.

Assessment of Institutional Theory

The institutional perspective provides several advantages for understanding interorganizational relations. First, institutional theory's primary contribution lies in its macro-level, societal or cultural analysis of organizational behaviour (Scott, 1995b). "Institutionalists remind us that no organization can be properly understood apart from its wider social and cultural context." (Scott, 1995a, p. 151). Organizations are both constrained and supported by the isomorphic forces found within that broader context (Scott, 1995a). In contrast to RDT, which focuses on the technical environment, institutional theory emphasizes systems of knowledge and rules in the cultural or normative environment, along with material factors (Scott, 1995a; Scott & Christensen, 1995). Thus, institutional theory encourages us to consider non-rational explanations for formal structures, such as IORs (Reitan, 1998). From an institutional standpoint, organizations will adopt certain forms or structures, such as IORs, to signal legitimacy to external actors (Scott, 1995a).

Second, institutional theory adds a new facet to the study of an organization's environment. In contrast to RDT, institutional theory suggests that environments also consist of cultural elements, such as norms and symbols (Davis & Powell, 1990; Scott, 1983). Thus, this perspective encourages us to consider both the technical and institutional environments (Bluedorn, et al., 1994; Meyer & Rowan, 1977; Scott & Meyer, 1983). The institutional environment is the source of norms that encourage organizations to conform for acceptance and legitimacy. In contrast, the technical environment encompasses the resource exchanges undertaken to improve the organization's effectiveness.

Third, institutional theory also allows us to understand how interorganizational relationships may include cooperation, not just competition for scarce resources (Reitan, 1998). "Institutional theory also sees the forests of cooperation and domain consensus, where others see only the trees of competition and conflict." (p. 300). Finally, Scott (1995a) argued that institutional theory has reawakened research interest in process and historical analyses. This is because both organizational structures and institutions are path dependent, developing over time. Thus, the institutionalization process will influence which organizational structures will eventually endure.

However, we can also identify key disadvantages of the institutional approach. First, institutional theory has become an umbrella for highly divergent research (Davis & Powell, 1990). Indeed, it has been criticized for the degree of dissension among theorists that ascribe to one of its many variations (Nohria & Gulati, 1994; Scott, 1987). For example, the concept of institution has many meanings and applications, creating a challenge for understanding the perspective (Scott, 1995a). The current popularity of the institutional perspective has a downside, because it may have become "a residual category that purportedly soaks up unexplained variance" (Davis & Powell, 1990, p. 360). Zucker (1988) has also argued that institutional theory is applied to a wide variety of organizations and contexts, when other perspectives (e.g., RDT) would be more appropriate.

Second, institutional theory needs additional theoretical development (Miner, 2002). Institutional theorists have not distinguished institutionalized phenomena from those that are not institutionalized (Hall, 1991). As a result, they tend to retroactively apply institutional theory to explain a variety of organizational issues. "This can be done in an almost mystical manner. Ideas and practices can come and go for no reason other than institutionalization." (Hall, 1991, p. 290). Instead, Hall argued that many organizational practices are adapted simply because they are effective. Similarly, institutional theory does not provide an adequate explanation for why some organizations enter into IORs that fall outside the norm for their external environment (Barringer & Harrison, 2002), nor answer important questions such as why some organizations attract more resources from the environment (Hirsch & Lounsbury, 1997). Indeed, institutional theory was developed to understand organizational similarities, rather than extol organizational differences, as in the work of earlier organization theorists including Selznick and Thompson.

Third, institutional theory has neglected the issues of power and interests (Davis & Powell, 1990; DiMaggio & Powell, 1991). This perspective inherently assumes that actors prefer stability to change, and consensus to dissent (DiMaggio, 1988; Oakes, Townley & Cooper, 1998). As a result, the institutional perspective has not explored how dominant actors might work to maintain their position within their institutional field, through tactics such as alignment with the state.

Finally, most institutional theory de-emphasizes the role of individual actors (Davis & Powell, 1990). "One of the key shortcomings is an oversocialized and rather passive view of human agency. Where does action come from and who benefits from organizational change?" (p. 363). With a focus on macro issues such as norms, the perspective includes little discernable connection to social action, disregarding the role played by individual and collective actors with unique means and ends (DiMaggio & Powell, 1991; Hirsch & Lounsbury, 1997; Reitan, 1998; Sydow, 2002). For example, Hirsch and Lounsbury (1997) argue that institutional theory needs a more explicit elaboration of the micro-level, purposive actions that create change in macro-level institutions. More specifically, Miner (2002) suggests that the conceptualization of institutionalization should incorporate internal processes within the organization and its individual members, including individual interests or motives. This is important, because it suggests that institutional theory greatly underemphasizes the importance of social action or choice in developing new organizational forms, such as IORs (Sydow, 2002).

Summary

Institutional theory goes beyond the simple logic of the RDT framework, to include a macro-level analysis of IOR formation, one that considers both the technical and institutional environments of the organization. The perspective also provides an understanding of cooperative IORs. However, authors have criticized the approach as too divergent and overused, lacking sufficient theoretical development. Institutional theory also neglects the issues of power and interests. It also de-emphasizes the role of social actors with unique interests and ends. This is important because the theory does not adequately address how organizations as social actors develop and maintain IORs. Stakeholder theory, the final content-based approach, overcomes some of those disadvantages, highlighting the importance of actor interests and power in interorganizational relations.

Stakeholder Theory

Stakeholder theory (Freeman, 1983, 1984) is an important theoretical framework for understanding ethical strategic management of the organization's environment. In stakeholder theory, the organization is the unit of analysis. However, the perspective focuses on the organization's interactions with other entities, or stakeholders, which affect and may be affected by the organization's actions in pursuit of its goals. Managers identify their organization's stakeholders by determining their `stake' (i.e., interest or claim) in the organization. Once managers identify and assess the claims of these stakeholders, they can adapt the organization's activities to ensure that they meet legitimate stakeholder needs. That is, organizations form IORs with key stakeholders to enhance achievement of their complementary goals (Barringer & Harrison, 2000).

Stakeholder theory is influenced by both behaviouralism and economics (Barringer & Harrison, 2000). It is essentially about relationships, including interorganizational relationships with actors in the external environment. However, theorists often draw upon economic theory to justify their assertions, or to identify the interests of key external actors.

Historically, stakeholder theory was strongly influenced by the work of early organization theorists, such as Chester Barnard (1938), who argued that organizations are cooperative systems that will want to collaborate with other entities (Barringer & Harrison, 2000). The term `stakeholder' was first used in 1963, in an internal memo at the Stanford Research Institute (SRI) (Freeman, 1984). Building on the work of several people in Lockheed's planning department, including Igor Ansoff (e.g., 1965), the SRI memo said that an organization survived due to the support of several external groups, in addition to its shareholders (Freeman, 1984). Nevertheless, we should credit Dill's (1958) field study of two Norwegian firms with introducing the concept of stakeholder into the academic literature on organization studies (Preston & Sapienza, 1990). Dill's (1958) study looked at effects of external actors, such as suppliers, customers, competitors and regulatory groups, on the decision-making autonomy of top management teams in two organizations. The subsequent development of stakeholder theory was shaped by several different literatures, including corporate planning, systems theory and corporate social responsibility (Freeman, 1984).

Stakeholder theory has a normative facet, which dominates the stakeholder literature and provides its `central core' (Donaldson & Preston, 1995). Thus, most stakeholder theorists would agree that organizations have a moral obligation to their stakeholders (Freeman, 1983, 1984). As a result, they use stakeholder theory to identify philosophical or moral guidelines about the organization's responsibilities to its stakeholders (e.g., Carroll & Buchholtz, 2000). For example, Donaldson and Preston (1995) argue that organizations have a moral obligation to form supportive relationships with their stakeholders.

Freeman (1984) categorized stakeholders according to two dimensions: interest or stake in the organization, and type of power held by the stakeholder. He identified three types of stakes or interests that a manager could attribute to a stakeholder group: *equity*, based on their equity investment in the firm; *economic* interest (e.g., customers and suppliers); and *influencers* (i.e., influenced in some way by the firm's activities, although not directly related to the market). For his purposes, Freeman defined power as the capability of using resources to influence events. He distinguished among *voting* (e.g., votes for directors; `voting' by supporting a takeover bid), *economic* (e.g., research and development investments) and *political* types of power (e.g., new legislation). Freeman suggested that we could evaluate each stakeholder group according to both its stake in the organization and type of power. Such an analysis could suggest overlapping goals and thus possible coalitions (i.e., IORs) for managers of the focal organization (Freeman, 1983).

Several years later, Mitchell, Agle and Wood (1997) developed an alternative technique for stakeholder assessment. According to these authors, managers can assess the salience of their stakeholders according to three characteristics: (1) the *legitimacy* or appropriateness of the stakeholder's claim on the organization; (2) the *power* of the stakeholder to influence the actions of the organization; and (3) the *urgency* of the stakeholder's claim, in that it is both important and must be addressed immediately. The most salient stakeholders are those with all three attributes, while non-stakeholders have none of the three attributes, in the judgement of an organization's managers. This new technique is importance, because managers cannot effectively manage their IORs with stakeholders, until they decide which stakeholders' claims are most important (Barringer & Harrison, 2000).

In a qualitative application of Mitchell et al.'s (1997) model, Driscoll and Crombie (2001) analysed a conflict between J. D. Irving (JDI), Limited, a large pulp and paper company in the Canadian Maritimes, and Nova Nada, a local monastery that ran a nature retreat near Irving's new cutting area. In the beginning, the monastery had, at best, an urgent claim on JDI. Through media reports, however, the monastery acquired limited power, which they found difficult to use against such a large, powerful corporation. Meanwhile, the authors described how JDI practiced stakeholder management, diminishing the monastery's perceived legitimacy, while boosting their own through various power tactics.

My review of the stakeholder literature identified three key themes. First, many authors have focused on identifying various organizational stakeholders and assessing their interest or stake in the organization. For example, Friedman and Mason (2004) assessed the salience of various stakeholders of major sport facilities, using the three attributes identified by Mitchell, Agle and Wood (1997). Friedman and Mason recommended this technique for policy development on similar projects, and management of stakeholder groups. Recently, some authors have also begun to study the management of potentially conflicting stakeholder interests. For example, Ogden and Watson (1999) studied the impact of enhanced customer service on corporate financial performance in the U.K. water supply industry. Although increased expenditures on customer service decreased short-term profits, they found that it enhanced returns to shareholders over time.

Second, the literature also includes some studies that recognize the different degree of power or influence held by various organizational stakeholders. For example, in their study of the ecological activities of Spanish hotels, Cespedes-Lorente, de Burgos-Jimenez & Alvarez-Gill (2003) found that these organizations were more likely to adapt environmentally-friendly practices when influenced by powerful stakeholders that were interested in ecological issues. Finally, various studies also focus on the performance outcomes associated with management of stakeholder interests (e.g., Ogden & Watson, 1999). Thus, authors frequently write about the expected positive impact of stakeholder management on financial performance, in addition to improved business ethics or social responsibility. Nevertheless, little empirical research exists on the hypothesized link between positive stakeholder interactions and enhanced financial performance (Harrison & Freeman, 1999).

Assessment of Stakeholder Theory

Stakeholder theory provides several advantages for research on interorganizational relationships. First, some theorists argue that it shows strong theoretical development, at least in some respects (e.g., Barringer & Harrison, 2000). For example, Carroll (1994) argues that stakeholder theory is able to accommodate a large number of stakeholders, providing immense scope for both managers and theorists. Also, the concept of a `stake' is clear-cut, allowing managers to identify the various expectations held by stakeholders, and to assess their power and legitimacy. Thus, the *potential* exists for managers to prioritize the claims of the most important stakeholder groups, and develop strategies to incorporate those stakeholders into their strategic decisions.

Second, stakeholder theory also explicitly recognizes the intrinsic value of all stakeholder interests (Freeman, 1983, 1984). Thus, unlike most conceptual frameworks, stakeholder theory includes an ethical component (Carroll, 1994; Wicks, Gilbert & Freeman, 1994). As a result, it may allow managers to develop a more ethical treatment of the organization's stakeholder groups (Carroll, 1994). Finally, in contrast to RDT and institutional theory, stakeholder theory encourages us to view the organization from the perspective of its interorganizational partners.

Nevertheless, we can also identify several disadvantages or problems with the stakeholder theory approach. First, according to several authors, stakeholder theory needs further development. Little empirical research has tested its main assertions (Barringer & Harrison, 2000; Harrison & Freeman, 1999). Thus, we accept stakeholder theory largely "on faith", perhaps because of its "moral correctness" (Barringer & Harrison, 2000, p. 377). According to Phillips (1997), the perspective "lacks the philosophical sophistication of other models of business ethics" (p. 52). That is, it lacks a normative foundation, resting mainly on Freeman's (1984) assertion that prudent organizations should consider the needs of groups that are affected by their activities. Also, as its name suggests, stakeholder theory emphasizes managerialist concerns – the management of stakeholder interests to improve corporate performance. As a result, the framework neglects important issues of organizational identity and meaning in relation to stakeholder groups (Wicks, Gilbert & Freeman, 1994). Indeed, Barringer and Harrison (2000) note that stakeholder theory is mainly just a macro perspective that provides an orientation to an organization and its interested groups.

Second, several authors argue that stakeholder theory does not adequately explain how organizations identify their stakeholders (e.g., Phillips, 1997; Preston & Sapienza, 1990). For example, both terrorists and the natural environment could qualify as stakeholders, based on current definitions of the concept (Phillips, 1997). "If the fact that a group may some day come to affect the achievement of an organization's objectives qualifies that group as a stakeholder, who or what fails to qualify?" (Phillips, 1997, p. 53). Thus, this author suggests that the current definition of the stakeholder concept is not especially useful.

Third, stakeholder theory does not explain how managers can deal concurrently with multiple stakeholders (Rowley, 1997). Once managers identify the organization's stakeholders, they must try to balance their claims (Preston & Sapienza, 1990). This becomes especially difficult when those interests compete or collide (Harrison & Freeman, 1999; Hardy & Phillips, 1998). Finally, the stakeholder model of IORs is still largely descriptive, rather than prescriptive (Barringer & Harrison, 2000). That is, it provides the organization with little detail on precisely how to form and maintain a strong IOR with another actor. More specifically, stakeholder theory largely ignores process issues related to power. For example, how do managers handle a power imbalance with a stakeholder (Hardy & Phillips, 1998)? How do they incorporate a more powerful stakeholder into a successful IOR, without subordinating the organization's interests to those of that stakeholder?

Summary

Stakeholder theory has many advantages for understanding IORs. For example, it recognizes the value of all stakeholder interests, and allows managers to develop an ethical treatment of the organization's IO partners. However, several authors criticize stakeholder theory for its unsophisticated treatment of ethical concerns. They also argue that it does not adequately explain key issues, such as how to identify legitimate stakeholders, and how to balance the potentially conflicting demands of several IO partners.

Concerns About Content Approaches to IORs

As described in the three previous sections, each of these content approaches to IO theory had certain advantages. I found that stakeholder theory was somewhat helpful in understanding how the facility managers could begin to identify potential IO partners for their sites. This approach also suggested why certain stakeholders might want to interact with the facilities (e.g., economic or political interests). My review of the stakeholder literature also suggested that the facility managers could try to balance the various claims of their stakeholders through their own moral assumptions, or with Mitchell, Agle and Wood's (1997) stakeholder salience model.

Institutional theory explained why the sites might enter into IORs, even though they might not help the site achieve its goals of cultural preservation and interpretation. That is, institutional theory would suggest that these public sector organizations might form IORs with private sector organizations, simply because many other public sector organizations were forming public-private partnerships. The RDT approach explained why the facility managers would enter into specific IORs on behalf of the site. That is, the managers would seek to form IORs with other actors to gain access to important resources, and to minimize the site's environmental uncertainty. RDT also suggested that an IOR would be less successful, if the site was too dependent on that actor.

What is missing from these content approaches? First, none of these three approaches allowed me to incorporate social action or identity as a central theme or argument. That is, they did not allow me to incorporate my understanding of the sites as social actors into a framework for understanding their successful IORs. As mentioned above, the RDT approach essentially ignored the role of goals or interests in organizational decision-making. Thus, it does not explain my initial fieldwork observations of a unique collective identity for each the three sites. In contrast, institutional theory did include a theory of action, since it suggested macro-level social or cultural institutions construct the interests and tactics of social actors. However, this would suggest that social actors within the same environment would be more similar than different. Therefore, institutional theory seemed to suggest that my three facilities should not have highly unique organizational identities, counter to my view. This approach also greatly underemphasized the role of a social actor's tactics or means in undertaking new organizational forms or practices. In contrast, the stakeholder approach clearly recognized that different interests would motivate both the sites and their potential IO partners. However, it provided little understanding of the tactics that the sites might use to incorporate stakeholders into a successful IOR.

Second, my exploration of these three content approaches, not surprisingly, suggested that they did not provide a processual analysis of interorganizational relationships (Pettigrew, 1997). According to Van de Ven (1992), we can distinguish among three meanings for process in the organizational literature: (1) a logic to explain causal relationships; (2) concepts to understand individual or organizational activities; and (3) a sequence of events to explain change. The third definition is most effective for my purposes, because it specifically describes how an organizational activity or issue (or an IOR) actually changes through time (Pettigrew, 1997). Thus, a useful definition of process is "a sequence of individual and collective events, actions, and activities unfolding over time in context." (Pettigrew, 1997, p. 338). Using Pettigrew's (1997) definition, it is apparent that none of the three content approaches described above would provide a processual analysis of the IORs at my three field sites. That is, none of the approaches would adequately explain how the sites' IORs would develop and change over time. They also would not explain the causal connection between IO interactions (i.e., events) and the ultimate success of an IOR.

Chapter Summary

In this chapter, I summarized an early stage of my research journey, as I explored three content approaches to understanding IORs. In the introduction, I discussed several questions about IORs that had emerged from my initial fieldwork at the three cultural sites. Then, I reviewed the three content approaches to IO theory, focusing on their key assumptions and arguments, along with advantages and disadvantages. The chapter concluded with a discussion of my main concerns about these content approaches. That is, I argued that these content approaches did not help me explain the connection between the site's organizational identity and its ability to develop and successfully manage IORs. They also did not provide a processual analysis of IORs at the three sites. In the next chapter, I continue my research journey with an exploration of process approaches to IORs.

Chapter Three

Exploring Process Approaches to Interorganizational Relations

> "[O]rganizations are more active in constructing the environments that impinge on them than is commonly recognized." (Weick, 1977, p. 267).

In Chapter Three, I describe the continuation of my research journey through my examination of process-based literature on interorganizational relations, which led me to develop an enactment model for conceptualizing interorganizational processes. This chapter is organized around two main sections: exploration of two process-based approaches to IORs, and an initial conceptual framework for understanding IO processes.

Process Approaches to Interorganizational Relations

After exploring selected content approaches, I wanted a better understanding of how the facility managers at my field research sites might identify potential IO partners, and then initiate appropriate ongoing interactions for maintenance of IORs. I also wanted to understand how organizational identity was linked to IORs. Thus, I turned to two alternative, process-oriented approaches for IO research: negotiated order theory and discursive construction.

I chose negotiated order theory because I was already somewhat familiar with this perspective. Based on my previous forays into that literature, I expected negotiated order theory to explain how IORs would emerge at the facilities, through the negotiations of the facility managers. In contrast, I discovered the discursive construction literature only after I had completed my initial fieldwork, when I began to explore alternative perspectives on IORs. This literature first attracted me because it built on the negotiated order literature. As I began to examine the studies, however, I learned that it also added new layers of understanding through its emphasis on power and discourse. Thus, I hoped the discursive construction literature would explain how practices among IO actors influenced the development of IORs at the sites, and the role of power within those IO processes. In the following two subsections, I outline the main arguments of both these frameworks, along with their key advantages and disadvantages.

Negotiated Order

Negotiated order is an interpretive perspective on social order, premised on an intersubjective ontology (Scott, 1992). With historical roots in interpretive sociology, this perspective has strong links to symbolic interactionism (Blumer, 1969) and social action theory (Silverman, 1970). Within this approach, theorists believe social order is emergent, based on shared meaning produced through ongoing processes of negotiation (Jary & Jary, 1995). These negotiation processes include joint activities, such as bargaining, compromising, and agreeing.

Negotiated order research studies social interactions at the interpersonal level. However, these interpersonal interactions may include individuals from different occupations (e.g., Strauss, Schatzman, Ehrlich, Bucher, & Sabshin, 1963), organizations (e.g., O'Toole & O'Toole, 1981), industries (e.g., Fineman, 1998), and societal sectors (e.g., Pasquero, 1991). Therefore, despite its micro level of analysis, the negotiated order perspective does allow analysis of social order at more macro levels, unbounded by reified, artificial structures such as `the organization' (Scott, 1992).

Strauss et al. (1963) developed the concept of `negotiated order' to describe the emergent social order within an organization. These authors explained how change and order could occur simultaneously within organizations. In their study, hospital employees engaged in negotiations to solve problems, such as incomplete regulations, segmentation by occupation, and different training backgrounds. These negotiations were ordered, as they were guided by the collective orientation of employees to meet the hospital's mandate of curing the sick. Strauss and his colleagues believed we could define an organization by its processes of adjustment through negotiation, not its formal structure. That is, structure was generally viewed as part of the context (Fine, 1984). If changes occurred to structure, organizational members might need to renegotiate order.

Since most negotiated order focuses on small-scale interpersonal or intraorganizational interactions, the literature on IORs includes less than a dozen papers. Nevertheless, I identified two broad groupings of papers in this literature. First, several papers focused on description of the process through which order is negotiated among organizations. For example, O'Toole and O'Toole (1981) described how individuals chose partners with which to negotiate an interorganizational alliance. "Alliances were negotiated initially with agencies considered easier to recruit, followed by more difficult negotiations. They selected as co-negotiators their counterparts in other agencies . . . on the basis of other, often informal relationships, with these people." (O'Toole & O'Toole, p. 34). After discussions began, the negotiators used informal, covert negotiations as a crucial part of the process. During negotiation meetings, for example, individuals "tended to employ indirect means (e.g., delaying tactics . . .) such as making trade-offs to reach agreements more profitable to their agency." (O'Toole & O'Toole, p. 34). This is an important study, because it helps us understand the events that may lead to formation of successful IO alliances. That is, the authors explained the processes through which people chose potential IO partners, and how organizations tried to meet their own interests through IORs. Other examples of this descriptive stream of negotiated order literature include Hall and Spencer-Hall (1982) and Altheide (1988).

Second, another group of papers focused more explicitly on using the negotiated order perspective to understand specific interorganizational collaborations. For example, Nathan and Mitroff (1991) studied the IORs among three major U.S. food manufacturers and other related organizations. According to these authors, negotiated order among organizations "occurs when organizations have jointly determined the terms of their future interactions with one another" (p. 164). The authors expected that, following the well-known Tylenol tampering crisis of 1986, food manufacturers and their stakeholder groups (e.g., government departments, consumers) would have jointly constructed shared `rules of the game' around how to react to future crises. However, they found that many actors in that interorganizational field held false or only tentative understandings about the expected roles of themselves and other actors. For example, the food manufacturers believed the grocers would want to assume responsibility, while the grocers did not know what role the food manufacturers expected them to play in a food tampering crisis. This article is important, because it illustrates how organizations may have difficulty in constructing shared 'rules' around common issues. Indeed, Geist (1995) argued that conflicts of interest will often emerge, as individual actors within a context (e.g., industry, market) undertake ongoing negotiations. In another example of this second stream in the literature, Pasquero (1991) used negotiated order theory to study collaboration of several Canadian organizations, as they worked toward common goals in environmental protection.

The negotiated order literature also acknowledges the key role of organizational identity in the negotiation of shared understandings within and among organizations. Stolte, Fine and Cook (2001) suggested that organizations develop a collective identity as the individual members build commitment to that organization. This type of shared meaning is negotiated through the ongoing interactions of an organization's members, as they seek to apply their own creativity and autonomy to their work. Further, Geist (1995) suggested that organizations would use negotiations to develop a more favourable identity, in the expectation that it would help them attract necessary resources. For example, Levy (1982) described how hospices used a variety of tactics, such as cost-benefit analyses and letters of support, to overcome their negative association with death. Instead, they worked to negotiate organizational identities as health care organizations, with a legitimate need for resources to meet their mandate of caring for the ill and dying.

We can identify several advantages of the negotiated order perspective for studying IO relationships. First, the perspective provides a processual approach, where structures such as IORs are not fixed, but instead are continuously constructed (Fine, 1984). That is, since social order is continuously produced, the perspective does not reify structure such as IORs (Scott, 1992). Instead, the focus is on intersubjective development of shared meaning within and among organizations. Thus, the negotiated order perspective includes a strong theory of action. Actors enter into negotiations, as they strive to achieve common mandates or goals, and try to resolve conflicts in their individual interests or motives. Second, the negotiated order perspective recognizes the role of organizational identity. Thus, it provides an explanation of the process through which organizational identity develops. More importantly, however, from this perspective we can explain how the perceived legitimacy of an organization's identity might influence the success of its IORs.

However, we can also identify two important limitations to the perspective. First, negotiated order does not acknowledge the influence of larger social processes, such as societal values and networks of power among actors (Pasquero, 1991). Second, the negotiated order perspective needs further elaboration on the process through which shared meaning develops (Fine, 1984). For example, how would FSIC determine which actors would be easiest to recruit into an IOR? Also, how would the FSIC and another organization jointly decide that a potential interorganizational partnership was appropriate? I expected a recent stream of critical research on interorganizational relations would identify specific techniques used by managers to construct relationships with interorganizational partners. In the next subsection, I provide an overview of the literature on discursive construction of IORs.

Discursive Construction of Interorganizational Relations

Recently, a small group of researchers (i.e., Hardy, Lawrence, Phillips and Grant) has critically examined issues of power and domination in collaborative interorganizational relationships (e.g., Hardy & Phillips, 1998; Lawrence, Phillips, & Hardy, 1999b; Phillips & Hardy, 1997). Most research on IORs has focussed on the advantages of interorganizational collaboration (Hardy & Phillips, 1998). From these functionalist perspectives, "collaboration is often seen as a means of reducing uncertainty, acquiring resources, and solving problems; and it is often assumed that stakeholders collaborate voluntarily" (Hardy & Phillips, 1998, p. 217). In contrast, a discursive construction perspective on IORs takes a critical stance, emphasizing issues such as unequal power relationships and the potential exploitation of IO partners. For example, I might examine whether HSIBJ co-opted other actors such as the Piikani Nation into a `collaborative' IOR, only to privilege its own interests over those of its less powerful IO partners.

Hardy, Phillips and Lawrence have used this critical perspective to study collaborative IORs in the United Kingdom refugee system (Hardy & Phillips, 1998; Phillips & Hardy, 1997) and the Pacific Northwest whale watching industry (Lawrence, Phillips & Hardy, 1999b). In the following paragraphs, I outline their main assertions about process and IORs, drawing from the empirical work mentioned above, and three more theoretical pieces (Hardy, Lawrence & Grant, 2005; Hardy, Lawrence & Phillips, 1998; Lawrence, Phillips & Hardy, 1999a).

First, the perspective focuses primarily on the *interorganizational domain* (Trist, 1983), rather than dyadic pairs of IORs. Drawing on the negotiated order (e.g., Strauss

et al., 1963; Nathan & Mitroff, 1991) and other process-based literatures (e.g., Altheide, 1988), Hardy and Phillips (1998) suggested that organizations interact within an interorganizational domain. These socially constructed domains are emergent structures that develop as interested organizations come together around common issues, as described in the following quote.

> As individuals come to share a vision of the issues and participants that constitute the domain, they become stakeholders. This shared appreciation creates an *identity* [italics added] for the domain, and mutually agreed upon directions and boundaries, which may be perceived and experienced as a permanent structure (Trist, 1983). In this way, the development of an interorganizational domain is a process of social construction that enables stakeholders to communicate, to be identified and legitimated, and to acknowledge the problems they face (Hardy & Phillips, 1998, p. 218).

Similarly, Lawrence, Phillips and Hardy (1999b) argued that participants within an IO domain must agree on three factors, to facilitate interorganizational collaboration. 1) The collaborating organizations must agree on the issue(s) that they can or should address collaboratively. 2) They must agree on the interests on which they will focus.

3) Finally, the organizations must agree on who will represent those interests, such as trade associations or other alternatives.

Lawrence, Phillips and Hardy (1999b) argued that the concept of an interorganizational domain is important, because it allows a more complex understanding of the `webs of collaboration' within an IO field. Their research on the Pacific Northwest whale watching industry serves as an example. This study examined the IO interactions among a variety of actors, including small and large boat operations, the research community, amateur whale watchers, ferry companies, tourism boards, various government organizations, and related industries such as seaplane operators. These organizations shared a variety of interests around commercial, research or leisure endeavours involving whales. The authors found collaborative interests primarily among the whale watching organizations, while other actors negotiated alternative roles. For example, the government monitored the activities of the whale watching actors, while the researchers worked somewhat more collaboratively with the whale watching companies, exchanging information on recent sightings of pods of killer whales, for example.

Second, the discursive construction perspective asserts that the *broader institutional context* plays a key role in the social construction of collaborative IORs (Lawrence, Phillips & Hardy, 1999b). That is, discourses around related issues in the broader institutional environment influence the development of the domain, and thus social actors within that domain (Lawrence, Phillips & Hardy, 1999a; 1999b). For example, in the U.K. refugee system, beliefs about the need for immigration influenced the discursive construction of the `refugee' (Phillips & Hardy, 1997).

Third, following on the previous point, *social action* and *identity* form an important part of this perspective. Thus, the conflicting goals and interests of the different actors within the refugee domain discursively constructed multiple identities for a key social actor, the refugee (e.g., genuine vs. economic, autonomous vs. dependent; Phillips & Hardy, 1997). Lawrence, Phillips and Hardy (1999a) argued that agreement on issues and interests is difficult, and interorganizational collaboration is characterized by contestations of power. Thus, social actors may try to negotiate a different role or identity, which provides more legitimacy and power. To accomplish that, they would work to associate themselves more directly with the issues in the IO domain. Thus, from this perspective, identity is developed discursively. That is, "social actors are not simply biological beings or collectives but include implicit or explicit relations to social context." (Lawrence, Phillips & Hardy, 1999a, p. 257). More recently, Hardy, Lawrence and Grant (2005) suggested that cooperative discourse around key issues could also produce a *collective identity* for several IO actors, which then could lead to effective IO collaboration among those actors. "The discursive construction of a collective identity enables participants to construct themselves, the problem, and the solution as part of a collaborative framework in which the potential for joint action is both significant and beneficial." (Hardy, Lawrence & Grant, 2005, p. 63). For example, Hardy, Lawrence and Phillips (1998) described how a new collective identity was produced discursively through conversations during a three-day workshop among several Canadian community organizations that worked with unemployed people. As they struggled to cope with the budget cuts imposed externally by a government office, they developed a new collective identity that extended well beyond their original mandate in terms of geographic coverage, types of clients, and the extent of their political involvement.

Finally, *power* plays a key role in the discursive construction perspective. In their study of the U.K. refugee system, Hardy and Phillips (1998) found that the dispersal of power among the organizations was linked to the type of engagement strategy used in IORs within that domain. They assessed power according to three characteristics: control of access to key resources, the acknowledged authority to make decisions, or demonstration of *discursive legitimacy*. That is, other actors accepted that they spoke appropriately about both the issues and organizations within the U.K. refugee system. Hardy and Phillips suggested that significant innovation and synergy within the refugee system was most likely to occur through either collaboration or contention among the IO actors. Collaboration occurred in reciprocal IORs, when many actors throughout the refugee system held various types of power. In contrast, contention occurred when an otherwise powerless actor, such as an organization managed by refugees, could use its discursive legitimacy to contest the interests of other powerful organizations, such as the government. The role of power is important, because it illustrates the dynamic processes of IORs. In particular, it suggests that effective IOR systems form when certain power relationships exist (i.e., wide dispersal of power, or discursive legitimacy of otherwise powerless actors). In contrast, the effectiveness of IO networks is lessened when powerful actors seek compliance from others within the domain. Nevertheless, actors can ensure their participation within the IO network, if they can demonstrate power through their discursive legitimacy. "Such a strategy emphasizes the importance of managing meaning, communication, and impression management in acquiring power." (Hardy & Phillips, 1998, p. 228).

The discursive construction perspective provides several advantages for studying interorganizational relations, with some similarities to those discussed above for the negotiated order perspective. First, the discursive construction perspective provides a processual analysis of IORs. It suggests that webs of interconnected organizations are socially constructed, developing over time as organizations recognize other organizations with similar issues or problems (e.g., Hardy & Phillips, 1998). For example, this perspective would explain how the IO domain for the three Southern Alberta cultural facilities changed, as they shifted their focus toward greater emphasis on revenue generation. Second, the discursive construction perspective also incorporates the concept of identity, explaining how a social actor's identity is constructed and contested through alignment with key issues in the IO domain (Lawrence, Phillips & Hardy, 1999a). The approach also explains how multiple organizations could develop a collective identity, leading to effective IO collaboration around important issues (Hardy, Lawrence & Grant, 2005). Third, this perspective challenges the assertions of content-based approaches, which suggest that powerful actors must have access to resources or formal authority (Hardy & Phillips, 1998). Thus, actors might have power because others believe they have the legitimate right to speak about issues and organizations within the IO domain. For example, within HSIBJ's interorganizational domain, the Piikani Nation is a powerful actor, because of its discursive legitimacy to speak about the Blackfoot culture. Finally, the concept of discourse also encourages us to study both language and practices, to understand how management action produces relationships at the IO level.

However, the discursive construction perspective also has certain disadvantages. First, how do organizations recognize others with similar issues or problems? Unfortunately, this approach does not adequately address this issue. Second, the existing literature in this broad perspective lacks detail on the types of activities that managers in a focal organization might use to develop and maintain effective IORs. This is important because the perspective does not allow me understand how the managers at my field research sites might develop a new IO domain around changing issues. What specific actions would a facility manager use, to align the interests of several actors?

Concerns About Two Process Approaches to IORS

As I have described in the two previous subsections, both the negotiated order and discursive construction perspectives have strong advantages over content approaches. In particular, my exploration of these literatures suggested that both approaches would allow me to use social action and identity as key factors in explaining IO processes for the three facilities. However, neither approach provided a complete processual analysis. First, neither perspective adequately explained how the facility managers could identify external actors that shared common problems and would easily enter into an IOR. Second, the negotiated order perspective did not acknowledge the importance of broader social processes such as societal values, and networks of power among IO actors. Finally, the discursive construction perspective did not explain how the facilities might actively work to incorporate other actors into an IO domain. In the next section, I describe how I developed a conceptual model based on enactment, which I believed would more effectively explain the IO processes of the three cultural facilities.

Initial Conceptual Framework: Enacting Interorganizational Relations

After reviewing the negotiated order and discursive construction literature, I was attracted to the idea that IORs developed as organizations interacted around common problems or issues. Later, as I reviewed my notes on the content-based IO literatures, I re-discovered Pfeffer and Salancik's (1978) discussion of enactment of the external environment in resource dependence theory. It seemed to me that enactment could provide a strong explanation of the IO processes that I wanted to understand.

Using material from Weick's (1969) well-known book, Pfeffer and Salancik (1978) argued that an organization enacted or created its own external environment, as it tried to make sense of it. This interpretation of the environment was retrospective, occurring as people within the organization noticed certain events or interactions that had already happened, while disregarding others. To develop this retrospective interpretation, people used their "accumulated knowledge" about the world (p. 73). Thus, we would expect each organization to enact different understandings of its external environment.

> There are no meanings that the world gives to us as valid. There are only our created beliefs, more or less supported by what we consider as evidence, and held with more or less conviction or doubt. The *meaning* is created by the observer [italics added]. (Pfeffer & Salancik, 1978, p. 73).

Pfeffer and Salancik (1978) also discussed two meanings of the term `enactment', based on Weick's (1969) work. "One is to decree as by legislative process; and the other is to recreate or represent as by staging a play. Both processes are involved when one interprets events from the environment."(Pfeffer & Salancik, 1978, p. 72). I saw a subtle yet important difference between these two meanings of the term, suggesting different phases or levels of making sense about the environment. The first meaning of enactment suggested to me that the manager could actively use techniques, such as texts and practices, to invoke desired IO interactions within the organization's environment. In contrast, the second meaning of enactment suggested that managers would attend to certain actors and not others, as they developed an understanding of past IO interactions. That is, they would retrospectively create the organization's IO environment.

I decided to build on these two meanings of enactment to develop a new conceptual framework for understanding process in interorganizational relations. First, I drew on Weick's (1995) more recent discussion of sensemaking, because it further explained how managers retrospectively understood the events and actors in the organization's external environment. Weick argues that sensemaking is the process through which actors create what they then interpret. They do this by noticing cues, which they then interpret to construct `sensible, sensable events'. Thus, I used Weick's conceptualization of enactment to explain how managers created an understanding of their interorganizational environment. I believed this would answer crucial process-related questions, such as how managers identified and assessed the interests of potential interorganizational partners. Through retrospectively making sense, or constructing a plausible understanding of their environment, managers developed a `sensable' understanding of the key actors in that environment.

However, sensemaking alone was not sufficient to explain the IO processes I was interested in. That is, it did not explain the actual actions that brought those interorganizational relationships into existence, such as negotiating and persuading. I decided to draw on actor-network theory (ANT), and particularly the sociology of translation (e.g., Callon 1986a; 1986b), to provide that explanation. Thus, sensemaking and ANT provided distinct yet complementary views of process in interorganizational relations. In the two subsections that follow, I outline the main characteristics of sensemaking and ANT, including representative research on enacting the environment. I begin with an overview of Weick's (1995) sensemaking.

Sensemaking

In this subsection, I discuss Weick's conceptualization of sensemaking, and its usefulness for understanding the first phase of enactment, in which managers create the organization's external environment. I begin with an overview of sensemaking, based on Weick's (1995) discussion of the approach. Next, I discuss selected research on enacting the external environment, following by an assessment of sensemaking's usefulness for understanding process in interorganizational relations.

Overview of sensemaking. The process of sensemaking is the making of sense, the ongoing construction of meaning in everyday life. In organization studies, the approach is usually associated with Weick (e.g., 1969, 1977, 1995), and other authors, including Gephart (e.g., 1992; 1993; 1997; 2004) and Gioia (e.g., Gioia, 1986; Gioia & Chittipeddi, 1991; Gioia & Thomas, 1996). While Weick was trained in psychology, his elaboration of sensemaking was also influenced by phenomenology (Schutz, 1967) and ethnomethodology (e.g., Garfinkel, 1984). Thus, Weick (1995) drew upon an eclectic group of literature to explain the sensemaking process.

According to Weick (1995), sensemaking involves the interpretation of noticed cues from the environment. However, sensemaking is much more than interpretation. It is the ongoing process through which individuals generate the setting that they then notice and interpret. "Sensemaking is about authoring as well as interpretation, creation as well as discovery." (Weick, 1995, p. 8). Through social interaction, individuals construct a sense of self or identity, in relation to and through the reflected interpretations of others. Sensemaking is triggered when the actor notices unexpected, surprising cues or events. Individuals then attach a plausible meaning to these cues, based on a perceived connection to other events or issues. Since the actor actually creates its own environment or cues, sensemaking is also viewed as continuous, *post hoc* justification of its own actions.

According to Weick (1995), sensemaking occurs at four levels of analysis. At the micro-level, sensemaking takes place within the individual, as described above. Drazin, Glynn and Kazanjian (1999) called this *intrasubjective* sensemaking. Based on Wiley (1988), Weick (1995) identifies three higher levels of sensemaking: intersubjective, generic subjective, and extrasubjective. *Intersubjective* sensemaking occurs when meaning is created jointly between two actors. That is, through social interaction, multiple actors develop a joint interpretation of events and actions

(Gephart, 1992). At the *generic subjective* level, meaning is no longer created through social interaction, but through normative social structure (Weick, 1995). At this level, individuals interact with norm-based roles and rules to create meaning. Thus, individual cognition about meaning is guided by these norm-based `scripts'. Finally, *extrasubjective* sensemaking is similar to culture or institutions, composed of taken-for-granted knowledge and institutionalized practices (e.g., Meyer & Rowan, 1977).

We can develop a more parsimonious framework if we combine the generic subjective and extrasubjective levels of sensemaking into a *collective* level, representing sensemaking that does not occur within the individual or between individuals. This level consists of stocks of knowledge, about everyday life (e.g., Berger & Luckmann, 1966; Schutz, 1967). People develop these stocks of knowledge through the objectification and accumulation of selected social interactions. They then draw upon these stocks of knowledge as `scripts', to make sense of future social interactions. Scripts are essentially cognitive schema or "webs of structured knowledge", which develop as we organize our sensemaking of concepts, events and actions (Gioia, 1986, p. 50). For example, Scheid-Cook (1992) found that stocks of knowledge, based partially on professional values and ideologies, influenced the interpretations that mental health professionals developed about court-mandated treatment for the mentally ill.

In my dissertation proposal, I argued that the facility managers could draw on their scripts about interorganizational actors, to interpret the organization's interorganizational relationships. That is, I suggested that the facility managers at the three cultural sites had stocks of knowledge about IORs, developed through their accumulated experiences in managing IO relationships at the site. However, I extended that argument, to suggest that we could view the different approaches in interorganizational theory as the accumulated, objectified knowledge of researchers as they studied IORs. Managers would incorporate selected aspects that resonated with these theoretical approaches in their stocks of knowledge, reinforced through professional socialization, including management training and development, the popular business press and discussions with colleagues. I argued that those stocks of knowledge about IORs would then *filter* the experiences that managers noticed (e.g., Starbuck & Milliken, 1988), as they interacted with their interorganizational environment. For example, managers could have institutionalized knowledge of arguments about the need to secure resources. This would result in a script in which managers understood interorganizational partners according to their control over access to critical or scarce resources. Similarly, a working knowledge akin to stakeholder theory would lead to an understanding of other actors according to their interests in and power over the focal organization's goal achievement.

Thus, sensemaking allows us to conceptualize the process through which the facility managers create an understanding of the organization's interorganizational environment. Through the ongoing process of sensemaking, the managers create a retrospective representation of that interorganizational environment. This process occurs at three levels, as presented above. The enacted interorganizational environment consists of an understanding about important current and potential interorganizational partners. This understanding is influenced by scripts, which are based on stocks of knowledge about interorganizational relationships. Those stocks of knowledge influence the factors or cues that managers use to identify and assess current and potential interorganizational partners. Key factors or cues would include access to resources, the legitimacy provided by the relationship, alignment of mutual interests, and potential power over organizational activities.

Previous research on enacting an understanding of the environment. Various researchers have studied enactment of the environment more generally. For example, Scheid-Cook (1992) studied the response of mental health organizations in North Carolina to changes in institutionalized norms and practices. Under a new state mental health policy, the courts could mandate mentally ill patients to participate in involuntary outpatient treatments, administered by these mental health organizations. Scheid-Cook found important differences among the organizations in their adherence to the new practices, and argued that we could explain the variation through different enactments: "Each organization construed the workings of the policy according to its own definitions and stocks of knowledge, and then conformed with its own enactment." (p. 537). In some organizations, the mental health professionals held a biomedical model of mental illness, and believed the best treatment included medication. Therefore, they did not agree with the new policy, which gave patients control over their own medication regime. In contrast, the mental health professionals at other organizations valued patient autonomy and unrestrictive treatments. In these organizations, the policy was enacted as a way to preserve patient dignity and control.

However, only a small number of researchers have specifically studied sensemaking and interorganizational relations. Two common themes are evident in that literature. First, several authors have focused on the cognitive models or processes that occur as managers jointly enact IORs. For example, in their study of the Scottish knitwear manufacturing industry, Porac, Thomas, Wilson, Paton and Kanfer (1995) argued that managers possessed a collective cognitive model about the organizational forms that were typically found within that industry. These authors suggested that managers developed this collective cognitive model through observation of other firms' behaviour and comparison to their own firm's actions. Similarly, Clark (1999) studied the change in managers' cognitions during formation of a strategic alliance, as they worked to made sense of IO processes.

Second, most research on sensemaking and IORs typically recognizes the important role of social interactions in the enactment process. For example, Ring and Rands (1989) studied the micro-level interpersonal transactions comprising a lengthy contract negotiation between NASA and 3M, as they developed a public-private IOR in the mid-1980s. They argued that the process of individual sensemaking, as opposed to developing an intersubjective understanding, was most important early in the IO negotiations. During that phase, individuals in both organizations developed an understanding of the environment. They reassessed their views on microgravity research, and their organization's place within that field, as they engaged primarily in discussions with colleagues in their own organizations. Thus, during this stage of IO negotiations, Ring and Rands suggested that individuals worked to enact the organization's identity within an enacted environment. This sensemaking process was followed by developing a shared understanding of the situation, and finally, committing to the IO agreement. More recently, Ring and Van de Ven (1994) theorized that an organization develops an understanding of its identity, through ongoing interactions with external actors. Through sensemaking they also developed "joint (not individual) expectations about their motivations, possible investments, and perceived uncertainties" of a potential business deal (p. 97). During these negotiations, the actors would use various bargaining tools to persuade others about the terms of a potential IOR.

Second, in a longitudinal ethnography, Kavanagh and Kelly (2002) studied a project to design and build a new process control system at an Irish pharmaceutical plant. The resulting multi-functional IO project network involved several different functional departments within three organizations, including the pharmaceutical firm, the supplier of the process control system, and a project management firm. The authors argued that the different actors did not collectively make sense, until key individuals from the three organizations moved to the same location to work together. At that time, they developed a greater understanding of the other actors' restrictions and anxieties, and eventually constructed a collective project identity. This is important, the authors argue, because it suggests that collective sensemaking requires that the actors are physically nearby, especially if no previous common understanding has existed among them.

Assessment of sensemaking. Sensemaking overcame many limitations of other interorganizational frameworks. First, it provided a framework for describing the processes through which managers create their own environment. Thus, it allowed us to understand the processes involved in identification of potential IO partners. Second, sensemaking also allowed us to view managers, and ultimately organizations, as social actors. For example, Gephart (1993) used textual analysis and an ethnomethodological approach to describe how organizational members used language to retrospectively make sense about an environmental disaster. Using terms such as `responsibility', `risk', and `authority', they deferred blame onto certain organizational actors. Similarly, Gioia and Chittipeddi (1991) described the active `sense giving' role used by a university president. He used symbols to `give sense' to other organizational members about the university's change in strategic direction. Third, sensemaking also provided a strong role for identity. As the individual or organization enacts its environment, it constructs its identity through the reflected interpretations of other actors. Finally, sensemaking allowed us to explain change in IORs. For example, research described earlier in this subsection suggested that organizations use various bargaining tools to arrive at a shared understanding of their (potential) IOR (Ring & Van de Ven, 1994).

Although sensemaking allowed us to understand many process issues in IORs, it did not provide a complete explanation of how organizations incorporate other actors into an IOR. That is, it did not explain specific techniques that actors could use to persuade other actors to align their motives or interests within an IO network. For that detail on IO processes, I turned to actor-network theory.

Actor-Network Theory

Actor-network theory (ANT) is useful for understanding the second phase of enactment, in which managers decree or bring the organization's IORs into existence, through active displacement of other social actors. Thus, ANT would allow me to examine how the facility managers continuously decreed interorganizational relationships into existence. According to ANT, social actors use intermediaries, such as texts and financial resources, to align the interests of other actors with their own interests. Thus, I could use ANT to explain how the facility managers used intermediaries such as organizational documents and artifacts to persuade external actors that they had important mutual interests, and should form an IOR to achieve their goals. In the following paragraphs, I describe ANT's key features.

Overview of actor-network theory. Historically, the ANT perspective is rooted in the sociology of knowledge (e.g., Fujimura, 1991; Law, 1986a), with influences from diverse fields, including semiotics, ethnomethodology and phenomenology (Calás & Smircich, 1999). Early ANT research was consciously reflexive, acknowledging the power of scientific or technical activity to shape social order (e.g., Callon, 1987; Latour, 1983). However, much early ANT research also focused on explaining the construction of relationships among scientific or technological entities (e.g., Callon, 1986a, 1986b; Law & Callon, 1988). Therefore, ANT provides a contemporary, alternative perspective in organizational studies (Calás & Smircich, 1999). In particular, it provides an understanding of process in the social and technical arenas, and an alternative conceptualization of interrelationships among social actors.

In a well-known ANT article, sometimes called the `scallops' paper, Callon (1986b) identified ANT's three important methodological principles. First, he argued that ANT is *agnostic*. That is, no viewpoint or interpretation is privileged over others. ANT researchers do not believe macro-actors, such as institutions, are more important than micro-actors, such as managers. As a result, the approach allows simultaneous analysis of individual and collective actors.

Second, a principle of *generalized symmetry* characterizes ANT (Callon, 1986b). The researcher does not distinguish between the social and the technical, recognizing that they are intertwined (see also Callon, 1980). Thus, the observer may select the vocabulary to speak for both the social and the technical (Callon, 1986b). By implication, organizational researchers cannot ignore the social aspects of organizational structure. Social interaction is intertwined with different modes of organizing, such as interorganizational networks. For example, through interactions with other actors, managers play an active role in constructing interorganizational networks.

Third, according to ANT's principle of *free association*, "the observer must abandon all a priori distinctions between natural and social events. He must reject the hypothesis of a definite boundary which separates the two." (Callon, 1986b, p. 200). This is important, because this third principle allowed me to include nonhuman actors, such as technical objects, cultural artifacts, and geographic landmarks, in an analysis of interrelationships among the actors at the three interpretive centres. [1]

The *social actor* [2] is a key concept in ANT, useful in understanding the process through which managers enact their interorganizational relationships. According to ANT, society is performative (Latour, 1986). That is, society is actively composed through the purposive interaction of actors. "Actors, whatever their size, define in practice what society is, what it is made of, what is the whole and what are the parts -- both for themselves and for others." (Latour, 1986, p. 273).

ANT also recognizes that an actor's *identity* plays an important role in the active composition of its environment. That is, purposive interactions with other entities in the environment or actor-world construct the social actor's identity (e.g., Callon, 1986b). That identity then guides the actor's performative interactions with other social actors (Callon, 1986a; Callon, 1986b). Since ANT does not discriminate based on analytic level or humanness, an actor's identity is constructed from heterogeneous elements, including social, political and economic characteristics (Callon, 1986b).

Three additional ANT concepts allow an understanding of the process through which these social actors enact their interorganizational network: actor-world, translation, and actor-network (Callon, 1986a; 1986b). (See Table 3.1 for definitions of these and other ANT terms.) The *actor-world* provides the context for the primary social actor in the network. It consists of associated entities, which are either natural or social, and individual or collective (Callon, 1986a; Callon, 1986b). Associations among actors develop through the process of *translation* (Callon, 1986b). Translation "attaches characteristics to [entities] and establishes more or less stable relationships between them. Translation is a definition of roles, a distribution of roles and the delineation of a scenario." (Callon, 1986a, p. 25-26). Therefore, the process of translation allows us to understand how managers actively enact an interorganizational network, composed of diverse actors with potentially conflicting

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[1] These controversial principles have been debated in the literature. including the well-known exchanges found in Pickering (1992) (Callon & Latour, 1992: Collins & Yearley. 1992a. 1992b: Woolgar. 1992).

[2] Callon's (1986b) terminology is preserved here. although ANT researchers typically used the term *actant*. to indicate that ANT acknowledges both human and nonhuman actors (e.g.. Latour. 1999).

Table 3.1

Glossary of Terms in Actor-Network Theory

Term / Definition
actor:
"These entities are not human alone . . . . These entities act, react and cancel each other out . . . . They may be either individual or collective." (Callon, 1986a, p. 22) "actors – whether they be human beings, institutions or natural entities -- . . ." (Callon, 1986b, p. 201) ". . . an `actor' is any entity able to associate texts, human, non-humans and money. Accordingly, it is any entity that more or less successfully defines and builds a world filled by other entities with histories, identities, and interrelationships of their own. . . Like intermediaries, actors may be hybrid. They may but need not be collectivities. They may take the form of companies, associations between humans, and associations between non-humans. . . . *[A]n actor is an intermediary that puts other intermediaries into circulation* . . ." (Callon, 1991, pp. 140-141) "The actor . . . is indissociable from the networks that define it and that it, along with others, helps to define." (Callon, 1991, p. 154) ". . . ANT is based on no stable theory of the actor; rather it assumes the radical indeterminacy of the actor. For example, the actor's size, its psychological make-up, and the motivations behind its actions C none of these are predetermined. . . . This hypothesis has . . . opened the social sciences to non-humans." (Callon, 1999, pp. 181-2)
actor-network:
"an interrelated set of entities that have been successfully translated or enrolled by an actor that is thereby able to borrow their force and speak or act on their behalf or with their support" (Callon, Law & Rip, 1986, p. xvi) "[T]he network of intermediaries accepted by an actor after negotiation and transformation is in turn transformed *by* that actor. . . . For this reason I speak of *actor-networks*, for an actor is also a network." (Callon, 1991, p. 142)
actor-world:
"the world of entities generated by an actor-network. . . . for any given actor, there is nothing beyond the network which it has created, which constitutes it, and of which it forms a part." (Callon, Law & Rip, 1986, p. xvi) "The actor-world is the context which gives each entity its significance and defines its limitations. It does this by associating the entity with others that exist within a network. There is thus a double process: that of simplification and juxtaposition."(Callon, 1986a, p. 30).
enrolment:
"The definition and distribution of roles by an actor-world. . . . [R]oles are not fixed and pre-established, and neither are they necessarily successfully imposed upon others." Callon, Law & Rip, 1986, p. xvi)

Term / Definition

interessement:

"The action of interesting, enrolling or translating which involves one entity attracting a second by coming between that entity and a third. Interessement is thus a transaction between three entities." (Callon, Law & Rip, 1986, p. xvii)

intermediary:

"an intermediary is anything passing between actors which defines the relationship between them. ... . [A]ctors define one another in interaction C *in the intermediaries that they put into circulation."*

- there are four types of intermediaries: texts or literary inscriptions (e.g., reports, books, notes), technical artefacts (e.g., machines, consumer goods), human beings (their skills, knowledge and know-how), and money in all its forms (Callon, 1991, pp. 134-135)

Obligatory Passage Point (OPP):

"A passageway through which all the other entities that make up its world must pass." (Callon, 1986a, p. 26).

"The translation thus maps out a geography of necessary points of passage for those elements who wish to continue to exist and develop." (Callon, 1986a, p. 27)

problematisation:

". . . [A] form of translation that posits an equivalence between two problems that requires those who wish to solve one to accept a proposed solution for the other. . . . [A] form of control that involves imposing an itinerary upon others by making oneself indispensable to them." (Callon, Law & Rip, 1986, p. xvii)

translation:

"The methods by which an actor enrolls others. These methods involve: (a) the definition of roles, their distribution, and the delineation of a scenario; (b) the strategies in which an actor-world renders itself indispensable to others by creating a geography of obligatory passage points; and (c) the displacement imposed upon others as they are forced to follow the itinerary that has been imposed. The elementary form of translation is that of interessement. A common form of translation in science is that of problematisation." (Callon, Law & Rip, 1986, p. xvii).

"Translation builds an actor-world from entities. It attaches characteristics to them and establishes more or less stable relationships between them. Translation is a definition of roles, a distribution of roles and the delineation of a scenario." (Callon, 1986a, pp. 25-26).

"Translations . . . both flow through *and* are held in place by intermediaries." (Callon, 1991, p. 145)

translator-spokesman:

the translator-spokesman "attributes to [an entity] an identity, interests, a role to play, a course of action to follow, and projects to carry out." (Callon, 1986a, p. 24) interests.

Successfully translated entities form the *actor-network*, "an interrelated set of entities" (Callon, Law & Rip, 1986, p. xvi). The primary actor in the network may borrow the force and act with the support of the successfully translated entities in its actor-network. Therefore, actors become more powerful through association with the actors they have translated (Latour, 1986). That is, ANT provides an understanding of how managers may manage power imbalances with other actors, borrowing their power through successful displacement into the actor-network.

Process of translation. The translation process consists of four overlapping moments: problematization, interessement, enrolment, and mobilization (Callon, 1986b). In the problematization moment, the primary actor tries to become indispensable to other actors that are important to its issues and goals (Callon, 1980). To accomplish this, it defines the other actors and identifies their apparent primary goals (Callon, 1986b), or `imputed interests' (Callon & Law, 1982). After identifying the imputed interests of the other entities, the primary actor tries to enlist them in achievement of its own goals, by detouring them through an Obligatory Passage Point (OPP). Thus, power through discourse is a key issue in the sociology of translation (Law, 1986a; McGrath, 2002). This detour through an OPP is presented as an advantage to the other entities, allowing them to overcome `obstacle-problems' that would otherwise prevent them from achieving their own goals (Callon, 1986b). Therefore, a successfully established OPP imposes an alternate view on the other entities (Callon, 1986a; Law, 1986b). They accept that they will only overcome obstacle-problems, and achieve their goals if they pass through the OPP.

To define each other mutually, and give form to the network, actors use four different types of intermediaries (Callon, 1991):

- Texts or literary inscriptions, such as books and journal articles,
- Technical artefacts, such as scientific instruments,
- Human beings, and their skills and knowledge, and
- Money in all its possible forms.

Interessement locks into place the association between the primary actor and another entity (Callon, 1986b). In this moment of translation, the primary actor comes between the entity and any other entities that may attempt to enrol it in their own actor-networks. Enrolment is the third moment of the translation process. The primary actor uses various strategies to define and designate interrelated roles to the actors that it needs in its actor-network. Examples of enrolment strategies include "multilateral negotiations, trials of strength and tricks that accompany the interessements and enable them to succeed." (Callon, 1986b, p. 211). These enrolment strategies occur between the primary actor and representative spokespersons of the other collective actors. Therefore, mobilization, the fourth moment of translation, is successful if the other actors accept representation by their spokespersons. If that occurs, the primary actor has displaced the other actors into actively supporting its goals.

Actor-networks are dynamic, continuous accomplishments. However, at any time we can describe the actor-network according to its relative convergence and irreversibility. In convergent actor-networks, the enrolled actors agree upon issues and goals (Callon, 1991). Networks are irreversible when their components are strongly interrelated. However, an actor-network is irreversible only in comparison to others; "all translations, however apparently secure, are in principle reversible." (Callon, 1991, p. 150). The translation process may fail during any of its four moments (e.g., Callon 1986a; 1986b), for example, if actors are successfully counter-enrolled by another actor-network (Callon & Law, 1982).

Previous ANT research on enacting interorganizational relations. Within the science and technology literature, ANT has existed as a distinct theoretical framework since at least the mid-1980s (e.g., Callon, 1986a, 1986b; Law, 1986b). However, the organization studies literature includes only a few examples of empirical research using ANT as the theoretical framework (e.g., Knights, Murray, & Willmott, 1993; Law, 1994; Newton, 1996). Thus, only a few authors have studied interorganizational relations using the ANT perspective, and in particular the sociology of translation. Two of those studies will serve as representative exemplars of this literature. First, Knights et al. (1993) used the sociology of knowledge, along with Foucault's concept of power/knowledge (Gordon, 1980), to critically analyze a voluntary knowledge network of twenty private sector insurance companies. However, their study differed from my research in several important respects. Knights et al. (1993) studied a homogeneous network, composed of knowledge workers and insurance companies. Therefore, their research did not incorporate certain distinctive features of the ANT approach, such as nonhuman actors. More important, their study used a critical approach with a very different aim than my dissertation. That is, the purpose of their study was to provide a critique of the current problematization of knowledge work, rather than to focus on the IORs between the knowledge workers and insurance companies.

Second, Bloomfield and Best (1992) also used Callon's (1986b) sociology of translation to describe IORs between consulting firms and their client organizations. In particular, Bloomfield and Best (1992) described how Information Technology (IT) consultants used managerial discourse to convince representative members of the client organizations that the consultants had the best IT knowledge and business experience. That is, to place themselves between the client organization and other IT consulting firms, they argued that their system would lower costs, provide a competitive advantage or increase the client organization's effectiveness. The consultants also suggested that IT specialists in the client organizations tended to focus on short-term results, while they were better at thinking strategically about the role of IT within the client firm. In that way, they effectively rerouted the client through the consulting firm's Obligatory Passage Point.

Application to the initial field material. As I surveyed the ANT literature, I continued to explore the initial field material, and identified several examples of key ANT concepts. Table 3.2 shows example extracts from my field notes, which illustrate several ANT concepts. The initial field material also suggested that the entities associated with Head-Smashed-In-Buffalo Jump included First Nations groups, ranchers, the town of Fort Macleod, the artifacts, and perhaps the ancient buffalo jump. Figure 3.1 shows a potential representation of that *actor-world* for HSIBJ. The identity of HSIBJ as the social actor called `The Trickster' emerged

Table 3.2

Examples of Actor-Network Theory (ANT) from Initial Field Material

Term	Example
actor	*FSIC as the social actor "The Pretender"* . "The original name of the Centre was supposed to refer to the Crowsnest Historical Corridor. However, the local MLA intervened, and stated the Centre would attract more visitors if it was named after the Frank Slide. [AAA] said that occasionally visitors complain . . . that the facility's name is misleading. . . . [M]ost exhibits focus on the general history of the Crowsnest Pass, particularly coal mining." (FN, July 13, 1998)
actor-network and actor-world	*The actor-world is the totality of important actors identified by the manager. The actor-network consists of those actors that the manager/site has successfully enrolled, and therefore those that they interact with most frequently.* "[CCC] had spent some time with [FFF], the executive director of the Friends society for the Centre, developing a list of external stakeholders. They separated the stakeholders into two sections, based on frequency of interaction. . . . He is responsible for calling meetings [of the Advisory Board], and told me that he does so only a couple of times a year. His belief . . . is that if the committee meets too often, it becomes over-involved in the daily operations of the site." (FN, July 10, 1998)
enrolment	*An example of unsuccessful enrolment.* "[BBB] recently proposed that they contract with an operator to offer helicopter tours over the site. First, he had to sell the idea to his staff, and to the Elders, which he did successfully. However, [JJJ stakeholder group] opposed the proposal. . . . When the proposal went to the Advisory Board, Ait only took them 10 minutes to say no . " (FN, July 8, 1998)
interessement / translation	*The site is borrowing the force of the Elders, in an effort to translate the Native employees.* ". . . [T]hey are experiencing some difficulties running their planned tipi campground. Several native employees have insisted that teepees cannot remain unoccupied for more than a couple of days. They claim religious or traditional reasons for this. To do this, however, has increased the program expenses.

Term	Example
	. . . As a solution, they are forming an advisory committee of Elders from the reserve. . . . They will essentially become the final word on matters related to native culture and spirituality." (FN, July 7, 1998)
intermediary	*Proposing use of new Board members as intermediaries to raise recapitalization funds in the community.* "[XXX] was suggesting the Advisory Board change its terms of reference to include two additional members, and establish a fundraising subcommittee. The . . . committee . . . would include the two new board members. That subcommittee would vet any fundraising ideas, provide local knowledge about contacts and corporations, and provide connections to corporate donors." (FN, July 22, 1998)
problematisation	*Using continued employment as problematization in ongoing translation of Peigan Nation.* "In the recent past, about 3 or 4 years ago, the Peigan Nation suddenly asked for a portion of the admission receipts, stating that the site was `selling our culture.' [BBB] handled this by waiting them out. Eventually . . . the issue died. In exchange, however, the Centre did offer to continue scholarships to post-secondary native students. They also pointed out that under the current arrangement the site employed a large number of natives. If they were forced to share admission fees, they might need to scale back the number of employees." (FN, July 8, 1998)
translator-spokesman	*Head interpreter as translator-spokesman for the site's actor-network, interpreting interests and a role for the audience of local businesspeople.* "[T]he head interpreter got everyone's attention and began his `sales pitch.' . . . The speech was masterful in its own way, referring to the Mormon temple just before the carriage museum, and therefore calling upon the pride of the primarily Mormon audience." (FN, June 17, 1998)

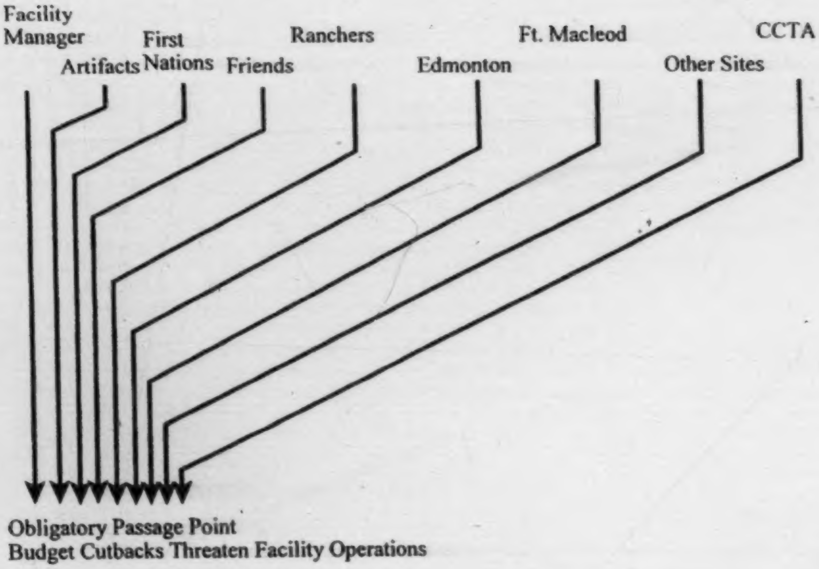
Facility Manager
Artifacts
First Nations
Friends
Ranchers
Edmonton
Ft. Macleod
Other Sites
CCTA
Obligatory Passage Point
Budget Cutbacks Threaten Facility Operations

Figure 3.1. Translation of actors in the external environment by HSIBJ ("The Trickster"). Problematization stage of the translation process.

through its interaction and association with these other entities in its actor-world.

The field material also suggested how HSIBJ might develop interorganizational relations through the process of *translation*. For example, the material suggested that an opportunity for an Obligatory Passage Point at HSIBJ might be government budget cuts, and the resultant need to find other ways to fund their programs. As shown in Figure 3.2, the initial material also suggested the interest that the facility manager imputed to members of the nearby Piikani Nation: the desire to find employment near the reserve. High unemployment on the reserve was the corresponding obstacle-problem that blocked attainment of this goal. The facility manager could try to solidify the association by presenting HSIBJ as an important source of local employment. In this way, both actors would achieve their goals. The First Nations groups would cooperate with the facility manager's goal of maintaining the site's programs, while achieving their own goal of local employment.

I also found examples of interessement in the initial field material. For example, as shown in Figure 3.3, HSIBJ came between the First Nations groups and other sources of local employment. To do this, they developed a greater interest among local Natives for employment at HSIBJ. That is, HSIBJ made employment at the site more attractive than employment by other entities, such as the Band Council, and private industry either on the reserve or in nearby towns and cities. I speculated that they would appeal to a desire to participate in preservation and interpretation of traditional Blackfoot culture.

Assessment of actor-network theory. My review of the ANT literature, and in particular Callon's sociology of translation, developed my belief that it also addressed many limitations of other approaches to IORs. First, as described earlier, it provided a conceptualization for understanding the processes through which managers enact other actors into IORs with their organization. Thus, it effectively allowed me to build on the explanation provided by sensemaking, in the first phase of my enactment model. Second, ANT included social action and identity as strong components. Society and other structures, such as IO networks, are actively constructed through the interactions of actors. Those interactions construct the social

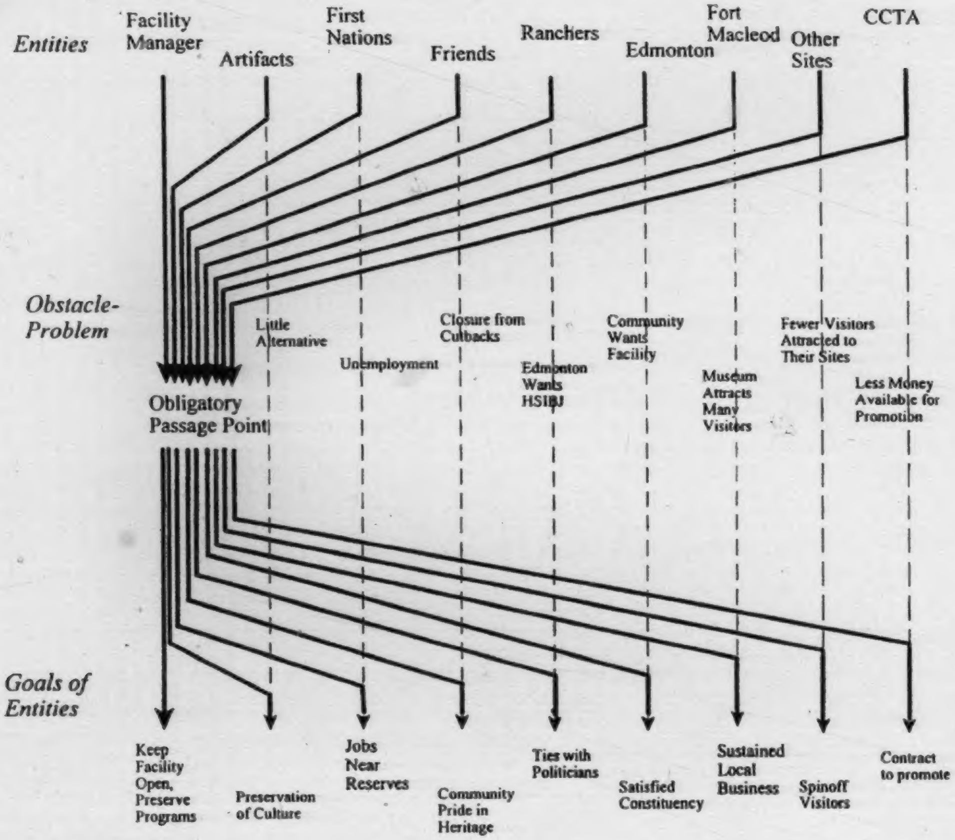
Entities
Facility Manager
Artifacts
First Nations
Friends
Ranchers
Edmonton
Fort Macleod
Other Sites
CCTA
Obstacle-Problem
Little Alternative
Unemployment
Closure from Cutbacks
Edmonton Wants HSIBJ
Community Wants Facility
Museum Attracts Many Visitors
Fewer Visitors Attracted to Their Sites
Less Money Available for Promotion
Obligatory Passage Point
Goals of Entities
Keep Facility Open, Preserve Programs
Preservation of Culture
Jobs Near Reserves
Community Pride in Heritage
Ties with Politicians
Satisfied Constituency
Sustained Local Business
Spinoff Visitors
Contract to promote

Figure 3.2. Translation of actors in the external environment by HSIBJ ("The Trickster"). Imputed interests of those actors.

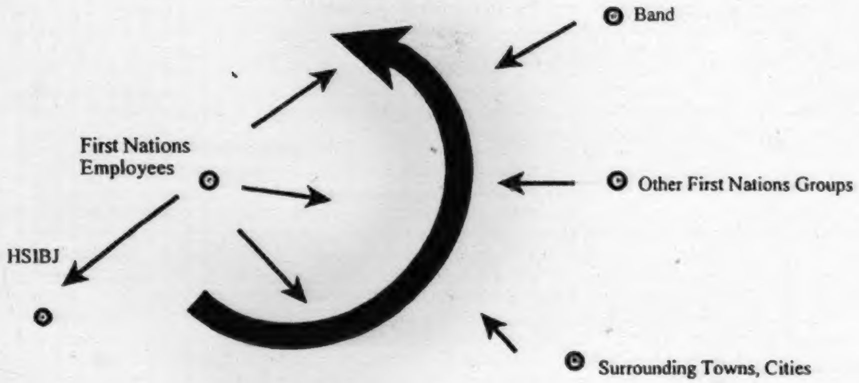
Band
First Nations Employees
Other First Nations Groups
HSIBJ
Surrounding Towns, Cities

Figure 3.3. Translation of actors in the external environment by HSIBJ ("The Trickster"). Interessement of First Nations employees.

actor's identity, which then guides its ongoing interactions with other actors, either human or nonhuman. Finally, the sociology of translation also emphasized the dynamic, continuous accomplishment of IORs. If the associated actors did not share strong agreement on issues and goals, then they could be counter-enrolled by another actor-network. However, ANT also has some potential weaknesses in its application. For example, we may tend to anthropomorphize nonhuman actants, when we ascribe imputed interests to them. Similarly, when we impute interests to collective actors (e.g., FSIC), we may devalue the interests held by the individuals that comprise that collectivity. In the next subsection, I describe my attempt to illustrate this two-stage enactment model.

Attempt to Illustrate the Initial Conceptual Framework

As I discussed in Chapter One, the dissertation is a conceptual exploration of the IO literature. Following my initial fieldwork at three cultural sites, I explored several content and process-oriented approaches to IORs. As I moved iteratively between the literature and my initial field material, I eventually developed a two-stage conceptual framework on enacting IORs. Although the dissertation was mainly conceptual, I wanted to illustrate the usefulness of the conceptual framework with analysis of longitudinal interviews conducted at the three sites. Table 3.3 provides detail on those interviews, while Table 1.1 in Chapter One provides information on the typical responsibilities and activities of each interviewee. According to researchers of organizational processes, the basic units of analysis are events and activities (e.g., Peterson, 1998; Pettigrew, 1997; Van de Ven, 1992) Therefore, I decided to focus on the participants' descriptions of organizational and interorganizational events in the interviews, to illustrate how they enacted their environment and their interorganizational partnerships. In this subsection, I explain the difficulties that I encountered, as I tried to use interview data to illustrate the proposed enactment model.

Enacting the external environment. First, I needed to examine the interviews to learn how managers and other government employees at each site created their

Table 3.3

Summary of Interviews in Each Time Period

Site	Time Period $_1$ 1994	Time Period $_2$ 1995	Time Period $_3$ 1996	Time Period $_4$ 1997	Time Period $_5$ 1998	Time Period $_6$ 1999
FSIC		Facility Manager	Facility Manager	Program Coordinator	Preliminary Fieldwork at Three Sites	Facility Manager Education Officer
HSIBJ	Facility Manager		Facility Manager Education Officer	Facility Manager Events Coordinator		Acting Facility Manager*
RACC		Facility Manager	Facility Manager Curator Interpretation Officer	Facility Manager		
Friends/FSIC				Friends Board Member		Friends Director
Friends/HSIBJ				Friends Director		Friends Director
Friends/RACC			Friends Director & Board Member (joint interview)			Friends Director

Note. FSIC = Frank Slide Interpretive Centre; HSIBJ = Head-Smashed-In Buffalo Jump; RACC = Remington Alberta Carriage Centre. * Regional Director was Acting Facility Manager at Site B.

facility's external environment, through sensemaking about the site and its IO actors. To develop the data analysis procedure, I did an in-depth analysis of a lengthy interview with the facility manager at FSIC. I chose this detailed interview because it included long sections of reflective talk by the manager. To analyze the interview, I coded each sentence for evidence of each of the seven properties of sensemaking (Weick, 1995), within NUD*IST (QSR, 1997), a well-known qualitative data analysis package.

This experimental coding provided important insights for the research. For example, I found it easiest to identify interview segments that suggested identity construction of the manager, the site or the system of sites. This suggested to me that identity construction formed an important part of the manager's reflections on notable events and interactions at the sites. The experimental coding also provided insights for the data analysis procedures that I eventually used on all the interviews, which I describe below. Four of the seven properties seemed to provide a distinct, yet complementary understanding of the manager's retrospective sensemaking about IO interactions: identity construction, enactive of a sensible environment, extracted cues and plausibility. Coding for the other three properties did not seem to contribute additional insight.

Based on these insights, I developed and planned to use the following data analysis procedure to identify examples of how the facility managers enacted their external environment. First, I analyzed each interview for evidence of the four properties of sensemaking listed above. To do this, I used word searches with the NUD*IST computer program, because other qualitative researchers have suggested this technique would result in a satisfactory analysis (e.g., Lindell, Melin, Gahmberg, Hellqvist & Melander, 1998). I identified the search words and phrases through the analysis of one interview, as described above. I believed that these search terms, summarized in Table 3.4, were all strong indicators of the relevant sensemaking property.

Second, my plan was to identify patterns and themes in the interviews of each individual. That is, I expected to identify the events and interorganizational

Table 3.4

Example Indicators for Sensemaking Properties

Sensemaking Property	Example Indicators
Identity construction	I, me, myself, we, us, ourselves
Enactive of sensible environments	they, them, themselves, community, Edmonton
Extracted cues	*RDT:* budget, cash control, cooperation, depend(ence), funds, interdependent/ce, money, need(s), power, resource(s) *Institutional theory:* appearance, expect, legitimate legitimacy, normal(ly), political, pressure(s), should, social *Stakeholder theory:* citizen, economic, government, interest in, political, stake in, stakeholder, voter
Plausible	because, believe, feel, know, maybe, perhaps, reason, see, seems, so suppose, sure, therefore, think, thus, why

interactions around which the interview participants were sensemaking. Therefore, this stage of the analysis would result in a summary of *intrasubjective* enacting of the IO environment.

Third, I planned to compare these descriptions, to produce summaries of the patterns of *intersubjective* sensemaking. That is, I would identify descriptions of common events or interactions in the interviews of the facility managers, and of different participants at the same and other sites. Then, I would compare the manager's descriptions with those of others, to find both commonalities and differences. I expected these patterns to reveal the jointly enacted external environment within and among the three cultural facilities. For example, if the facility manager and employees jointly enacted an understanding of the site's environment, comparison of the interviews would identify similarities in their accounts of events and interactions at the site. Similarly, if the three facility managers displayed similar understandings, it would suggest that they had jointly enacted aspects of their IO environments. Finally, I also planned to compare their descriptions of extracted cues, to identify patterns of *collective* sensemaking. I argued that an analysis and comparison of the extracted cues would show the use of an objectified stock of knowledge about IORs in enactment of the IO environment.

Enacting interorganizational relationships. To illustrate the second phase of my conceptual framework, I also planned to analyze the interviews to show that ANT would explain the manager's role in forming and maintaining the interorganizational network. Again, I planned to use the NUD*IST package (QSR, 1997) to conduct the analyses. Specifically, I expected to use the following data analysis procedure. First, I would manually identify and code for the interests that the three managers were imputing or attributing to other actors in their actor-world. Second, I would code for each instance of the managers' attempted or successful translation of the other actors. I would identify examples of the translation process, through the managers' use of the four types of intermediaries (Callon, 1991): texts; technical artefacts; human beings and money. Finally, I would analyze each translation attempt, to identify the Obligatory Passage Points through which the manager attempted to displace the other actors. To illustrate the second phase of the conceptual framework, I would present representative samples of translation, for different types of IO actors.

Difficulties encountered with the analysis and framework. When I began to analyze the interview data, I immediately ran into two difficulties in applying this conceptual framework. First, at a practical level, my analysis of the first phase (i.e., enacting the environment) resulted in multiple codes attached to most lines of the interview.[3] I found this difficult to interpret, because the large numbers of codes made it difficult to identify any particular pattern to those codes. Second, it became apparent that the initial conceptual framework was not adequate for understanding IO processes at the three sites. Although I had explored and assessed several different IO literatures, I still had not situated my research, neither methodologically nor within the IO literature (Mason, 1996; Morse & Richards, 2002). In frustration, I returned to my initial field material and my notes on the IO literature. Immediately, I was drawn back to the explanatory power of the concept of `identity' for understanding IORs, as I discuss in the next chapter. I believed that I needed to reframe my analysis, to centre around each site's identity, as I discuss in the next chapter.

Summary

In this section, I described a two-phase model for enacting interorganizational relationships, which I developed from two similar but subtly distinct meanings for `enactment' (Pfeffer & Salancik, 1978). In the first phase, based on Weick's (1995) seven properties of sensemaking, I suggested that managers enacted or created the organization's IO or external environment. In the second phase, I suggested that managers enacted interorganizational relationships by translating other actors into the IO network. This argument was based primarily on ANT's sociology of translation (Callon, 1986b). However, when I tried to illustrate the model using secondary interview data from the three cultural sites, I found it difficult to interpret my analysis, using that conceptual framework. When I returned to the literature and my initial field material, I was immediately drawn back to the explanatory power of `organizational identity'.

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[3] I conducted this analysis using my newly purchased Atlas (Muhr, 1997) software for qualitative data analysis, as I had moved away from Edmonton, and no longer had access to NUD*IST (QSR, 1997) software.

Chapter Summary

In this chapter, I summarized the continuation of my research journey, as I reviewed two process-oriented approaches for understanding IORs. My exploration of that literature led me to develop a two-phase enactment model for understanding process in IORs, based on sensemaking and actor-network theory. However, my attempts to illustrate that model were unsuccessful, and I realized that I need to develop a new conceptual framework that acknowledged the important role of organizational identity in interorganizational interactions. In Chapter Four, I describe how I developed the final conceptual framework around construction of organizational identity.

Chapter Four

Identity Construction Through Interorganizational Relations

"There is nothing so useful as a good theory." – Kurt Lewin

In Chapters Two and Three, I summarized my exploration of various content and process-oriented approaches to understanding interorganizational relations. Each of these theoretical approaches had several advantages, as discussed earlier. However, none of the approaches allowed me adequately to explain my field observations about the important role of identity for interorganizational dynamics. That is, they did not allow me to incorporate my understanding of the sites as unique social actors into a framework for understanding how they developed successful IORs. In this chapter, I describe how I finally developed a new conceptual framework based on a central role for organizational identity. The chapter is organized around four sections: organizational identity and social action; developing the final conceptual framework; the identities of the three sites; and illustrating the final conceptual framework.

Organizational Identity and Social Action

The study of organizational identity is increasingly important, because organizations are experiencing rapid change due to globalization, technological innovations, geopolitical changes, and new employee-employer relationships (Albert, 1998). Thus, organizations cannot develop new strategies without thinking about what they are now, and what they want to be in the future.

In this section, I provide background on the concept of organizational identity. First, I discuss the nature of organizational identity, including a description of how organizational identity is constructed. Two well-known empirical examples of research on organizational identity are presented, to illustrate this material. Then, I explain the interrelationship between identity and social action.

Organizational Identity

In their important paper on organizational identity, Albert and Whetten (1985) argued that we could try to understand an organization's identity by uncovering what its members believed was central or fundamental, distinctive and enduring about that organization. Typically, the organization's central or fundamental issues are linked to its overriding purpose and goals. It is important for managers to understand these essential features, because they serve "as a guide for what [managers] should do and how other institutions should relate to them." (p. 267). This statement is important, because Albert and Whetten (1985) suggested that a manager's understanding of the organization's central characteristics influences both the organization's goal selection and the behaviour of its IO partners.

An organization's identity is also comprised of what distinguishes it from other organizations (Albert & Whetten, 1985). The organization defines what is distinctive about it, as it compares itself to other organizations or actors along self-selected characteristics. Organizations are usually `healthier', when their views about themselves are congruent with those of others in the external environment, as suggested by institutional theory (Meyer & Rowan, 1977) and resource dependence theory (Pfeffer & Salancik, 1978). Nevertheless, external actors typically see an organization's identity as more cohesive and monolithic than do its own members (Albert & Whetten, 1985). That is, an organization can have a hybrid identity, composed of two or more sub-identities with seemingly incongruent distinctive characteristics, which are often not apparent to outsiders. Indeed, Gioia (1998) argued that organizations may show different aspects of their identity to different viewers.

Finally, according to Albert and Whetten (1985), organizational identity tends to endure over time. More recently, however, some researchers have argued that organizational identity is actually more malleable, and thus changes more rapidly than was previously believed (Corley, Gioia & Fabbri, 2000). For example, in a study of planned strategic change at a large public university, Gioia and Thomas (1996) found that top officials at the university developed support for and actually effected change in its stodgy, political identity, by presenting an alternate view of the organization's desired future image as a 'top 10' research institution. Alternatively, we could argue that organizational identity remains relatively stable over time, as organizational members simply seek to reconcile new information about their organization with their previous views about their collectivity (Corley et al., 2000). This is so, particularly if we accept that its members will use labels or common terms about the organization, which nevertheless may hold different meanings for individuals. Thus, Corley et al. (2000) suggested that we should view organizational identity as having "continuity in its malleability", as it changes "behind a façade of endurance" (p. 108).

Drawing on Mead (1962/1934), Albert and Whetten (1985) suggested that organizational identity is constructed and re-constructed over time, as the organization self-reflects on its ongoing interorganizational interactions. This is similar to Mead's (1962/1934) discussion of identity construction at the individual level. Mead believed that humans develop a notion of self, or identity, through social interaction with others (Jary & Jary, 1995). Through play and other interactions, individuals merge others' views of them ("Me") with their own view of themselves ("I"). Individuals internalize the values of others to develop a notion of self, and learn to display this to the outside world through social symbols, such as language. Albert and Whetten (1985) suggested that a similar process takes place among organizations.

Other authors also propose that organizational identity is constructed and understood in relation or comparison to other organizations (e.g., Gioia, 1998). As part of this process, Gioia and Thomas (in Bouchikhi et al., 1998) argued that organizational identity and image provide an interpretive screen or lens, through which managers interpret the issues that they encounter in the organization's external environment. Elsewhere, Gioia and his colleagues elaborated further on this process through which organizational identity is constructed (Corley et al., 2000). These authors suggested that organizations or individuals project an identity to external actors, and then react to the image that other actors reflect back to them, by altering aspects of their identity.

> "In prototypical form, [social/environmental] interaction proceeds as an initial presentation of a self-image (by an individual or an organization) and subsequent responses by other people, outside agents or competitors, who reflect an interpreted image back to the presenting person or organization. Identity is then constructed through comparison of self, presented, and reflected images, which can either affirm or subtly disconfirm the initial presentation." (Corley et al., 2000, p. 104).

Thus, if the external environment is dynamic and complex, organizations will more frequently adapt their identity to the constantly changing images held by the external actors with which they interact.

It is important to note that individuals in the organization also contribute to construction of the organization's identity. For example, several researchers have suggested that the values and vision of top management directly influence the development of an organization's identity (Bouchikhi et al., 1998). Also, Ashforth and Mael (1996) argued that organizational identity is socially constructed through the iterative interactions and negotiations of its members. These authors suggested that non-leaders may become active negotiators in the construction of organizational identity if one or more of the following conditions apply: the organization's identity lacks coherence and is not widely shared, there are strong external forces for change, or sub-identities within the organization conflict with each other.

These ideas on the nature and construction of identity are illustrated in the following discussion of two well-known papers on organizational identity. In their well-known paper on the New York Port Authority's involvement with local homeless people, Dutton and Dukerich (1991) examined the interrelationship between image (i.e., how the organization believed other actors saw them), identity and issue interpretation. The purpose of the study was to understand how organizations and their environments are interrelated over time. Specifically, the authors wanted to develop a framework to understand how organizations adapted to and changed their external environment through actions in response to external issues. This case study used five sources of data, including open-ended interviews with employees, organizational documents, local newspaper and magazine articles, discussions with the Port Authority's taskforce on homelessness, and notes from a one-day training session. Based on this analysis, the authors developed a conceptual model that linked identity and image to issue interpretation and organizational action. They suggested that the identity and image held by employees of the Port Authority both guided and inhibited the interpretation of key environmental events and issues. That is, identity and image acted as filters through which members of the Port Authority interpreted the external environment. Then, those interpretations influenced the PA's future actions. Dutton and Dukerich argued that, to ensure its image matched its identity as an ethical, altruistic organization the PA gradually changed its behaviour toward homeless people at its facilities. For example, they built drop-in centres and advocated on their behalf.

In a related empirical study, Elsbach and Kramer (1996) examined the reaction of organizational members to events that seemed to threaten their organizational identity, and thus their own individual identity. To accomplish this, they conducted interviews with faculty, administrators and students at several U.S. business schools. Most of these business schools had experienced a recent change in their *Business Week* ranking among the top 20 U.S. business schools. Since external organizations such as *Business Week* emphasize criteria that universities often view as irrelevant, Elsbach and Kramer (1996) wanted to see how individuals at these universities would react to this "identity-threatening event" (p. 442). In brief, they found that the individuals reacted in two ways, to reduce the dissonance between their school's apparent reputation and its identity (Corley et al., 2000). First, they focused on their school's favourable qualities, ones that they believed business schools should show (e.g., an entrepreneurial focus), but that *Business Week* either did not consider or undervalued (Elsbach & Kramer, 1996). Second, the respondents made favourable comparisons between their school and other, more highly ranked business schools that exhibited such de-valued attributes, to reaffirm the worth of their school's core identity characteristics.

Social Action and Organizational Identity

Whetten and Mackey (2002) suggested that the current literature includes two different views on organizational identity. The first view focuses on the `identity in' organizations, and sees organizations as `collectivities' of their constituent members. From this perspective, organizational identity is conceptualized as the beliefs of individuals within that organization. Thus, related research focuses on questions around how members view the organization, and which members' beliefs most define that identity. The second view focuses on the `identity of' the organization as a whole, opening the way for conceptualizing organizations as social actors (Whetten & Mackey, 2002). Organizations interact with other actors as collective social actors, as though they were individuals (e.g., Czarniawska, 1997; Meyer, Boli, & Thomas, 1987).

An exploration of the literature reveals several suggested links between action and organizational identity. First, social action presupposes the existence of a unique, identifiable identity, at both the individual and organizational level. As Anne Huff suggested, "In order to exist, you have to act, and to act, you have to have some sense of who you are and some sense of what you are trying to do." (In Barney et al., 1998, p. 111). Thus, Huff is suggesting that action and identity are interdependent. An actor cannot choose what to do, until it knows who it is. Second, it is also suggested that identity may be the best predictor of the action that a social actor will take. As Albert (1998) wrote, "How one acts may depend more on who one is, who others think one is, and who one aspires to be than on any objective assessment of the opportunities and costs associated with a given direction." (p. 10). And finally, identity is also linked to the means social actors use, as they try to achieve their goals or interests. Indeed, Ashforth and Mael (1996) argued that identity is reciprocally related to strategy or tactics. That is, organizations will enact their identity or self-understanding through their chosen strategies. At the same time, organizational identity is reaffirmed or modified through the reactions that organizations receive from other actors as they employ new strategies.

Summary

The literature suggests that we can view the sites as collective social actors, with a unique identity. Organizational identity is commonly defined as what its members believe is central or fundamental, distinctive and enduring about the organization. The literature suggests that organizational identity is both constructed and understood through interorganizational interactions. The empirical literature also suggested to me that each site's identity/image was the interpretive lens through which the actors in its external environment were understood and how others understood it.

We cannot ignore the role of individuals in the construction of organizational identity. The literature suggests that the vision and values of top managers are important influences on an organization's identity. Thus, we would expect that the facility managers would have a strong influence on organizational identity construction at their site. However, if that identity were not coherent or widely shared, we would expect that other employees would also become active participants in negotiating or contesting it.

Developing the Final Conceptual Framework

In this section, I describe the development of a new conceptual framework, about identity construction through interorganizational relations. The section consists of two parts. First, I summarize my analysis of the literature on organizational identity and IORs. Second, I present the final conceptual framework.

Organizational Identity and Interorganizational Relations

To prepare for development of an alternative conceptual framework, I returned to the limited literature on identity and IORs. That literature included the material that I had examined as I studied my initial field material. I also returned to the literature on several content and process approaches to IORs, which I had reviewed earlier, in preparation to develop the initial conceptual framework. Finally, I identified the limited empirical research that focused on organizational identity, and the external environment generally, or IORs more specifically. That empirical literature is summarized in Table 4.1. It is important to note that, although some of the material I examined did make reference to identity, the interorganizational literature has largely neglected the central role of identity.

As I reviewed and summarized this literature, I identified three reoccurring arguments or findings that I believed could serve as the foundation for a new conceptual framework: continuous construction of identity through social interactions; the influence of identity on interpretation of the external environment; and the link between organizational identity and the `success' of IORs. In the paragraphs that follow, I describe the literature related to each of these themes.

The first theme that I identified is that **identity is continuously constructed through social interactions.** Earlier, I summarized key articles and books that suggested organizations construct their identity through ongoing social interactions. In their foundational article on organizational identity, Albert and Whetten (1985) drew on Mead's (1962/1934) work to outline an argument on the construction of organizational identity. Specifically, they suggested that an organization continuously constructs its identity, as it reflects on its IO interactions. Since then, various authors have outlined the same argument – that organizations construct an understanding of their identity in relation to other organizations (e.g., Gioia, 1998). In a more recent example, Scott and Lane (2000) theorized that organizations both negotiate and contest their identity through interactions among members of the organizations (i.e., typically top managers) and various external stakeholder groups. Thus, for example, managers will contest the negative appraisals that stakeholders reflect back to them, especially when those appraisals challenge their own individual identity, and could harm achievement of organizational goals.

In Chapter Three, as I reviewed various process approaches to IORs, I found that they typically incorporated similar arguments about identity. For example, the discursive construction approach explained how the organization, as a social actor, both constructed and contested its identity, as it aligned itself with key issues in the interorganizational environment (Lawrence, Phillips & Hardy, 1999a). Similarly, in the negotiated order approach, some authors argued that organizations would use various tactics to negotiate a new identity with external actors, and thus to potentially

Table 4.1

Summary of Selected Empirical Studies on Organizational Identity and Interorganizational Relations

Authors	**Problem Addressed / Central Purpose or Focus of Study**	**Sample or Participants, & Analytical Tools**	**Most Relevant Findings**
Dutton & Dukerich (1991) Theme 2	Theoretical models of the relationship among organizations and environments typically give primacy to either the organization, the environment or some combination of both. No organization-environment theories have focused on how organizations and their environments are interrelated over time. // To develop a framework for understanding how organizations adapt to and change their external environment, through patterns of action in response to environmental issues. Specifically, to examine the interrelationship between *image*, *identity* and issue interpretation.	Qualitative case study of the Port Authority of New York and New Jersey's interactions with local homeless people. Five sources of data included: (1) 24 open-ended interviews with Port Authority employees; (2) organizational documents (reports, memos, speeches) about homelessness over a 6.5 year period; (3) related local newspaper and magazine articles for 2.5 years; (4) ongoing conversations with Port Authority's taskforce on homelessness; and (5) notes from an all-day training session sponsored by taskforce. Data analysis consisted of developing a list of themes extracted from summaries of interviews, and then coding interviews for those themes. Developed a history of the homelessness issue.	Developed a conceptual model linking identity and image to issue interpretation and organizational action. Suggested that identity and image held by members of organization both inhibited and drove the interpretation of important issues or events from the external environment. That is, identity and image acted as filters through which organizational members interpreted the external environment. Thus, those interpretations became the basis of an organization's actions. Over time, the resulting patterns of organizational action may alter the external environment. Described how the Port Authority changed its behaviour toward homeless people at its facilities (e.g., built drop-in centres; advocated on their behalf). Thus, Port Authority tried to ensure its image matched its identity as a professional, ethical, altruistic

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
			organization.
Elsbach & Kramer (1996) Theme 1	Organizational identity, or the perceptions of its distinctive characteristics held by members of the organization, may be threatened by external events that question those central attributes. // To examine the reaction of organizational members to events that seemed to threaten their organizational identity, and thus their own individual identity.	Qualitative study that included 43 semi-structured interviews with faculty, administrators and students at 8 U.S. business schools. Most had experienced a drop or rise in their 1992 Business Week ranking among the top 20 U.S. business schools – i.e., an "identity-threatening" event. Additional data included records (e.g., school calendars; the school's MBA newspaper; alumni magazines; articles in local newspapers) about the rankings. Used iterative data analysis techniques, moving between the data, the literature and their developing theory.	The individuals reacted in two ways, to reduce dissonance between their school's apparent reputation and its identity. First, they focused on their school's favourable qualities that they believed business schools should show (e.g., entrepreneurial focus), but that Business Week either did not consider or undervalued. Second, respondents made favourable comparisons between their school and other, more highly ranked business schools that exhibited such de-valued attributes, to reaffirm worth of their school's core identity characteristics.
Fox-Wolfgramm, Boal & Hunt (1998) Theme 1	Perhaps because most change research has focused on second order (i.e., systemic) change, we know little about when, why and how first order change occurs (i.e., change within the system). This is a key gap in the literature, since first order change is much more typical. // The authors try to present a more balanced study of change, looking at the interplay	Case study that examined the patterns of first order change in two banks, as they responded to government legislation to prevent discrimination against demographic groups in the banks' communities. Based on interview and survey data, chose to study two banks in West Texas with different strategic orientations. One bank was a Defender (i.e., worked to defend its current niche	For the current study, the most relevant findings were about the two organizations' IORs with the government and other actors. Specifically, Fox-Wolfgramm *et al.* looked at the impact of an imposed change from an IO partner (i.e., government legislation), and how it affected the organizations' IORs with other actors, such as the

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
	between forces that resist and forces that push toward first order change.	within the banking industry), while the second bank was a Prospector (i.e., redefined itself and often entered into new product and market areas). Data on the two organizations included interviews with top managers, board members, members of regulatory agencies, and members of interested community groups. Other data included documents, archival records and observations. Coded the data to identify patterns and themes.	communities it served. The authors suggested that organizational change is not sustainable if it is inconsistent with the organization's actual and desired identity and image. Organizations that "virtuously" resist change, will only respond to external demands for change if they clearly recognize an incongruity between their organizational identity and their image (i.e., how they believe external actors view them).
Hardy, Lawrence & Phillips (1998) Theme 1	Postmodern approaches have highlighted the discursive, textual nature of organizations and organizing. These approaches cause us to question the link between `talk' and action. // To explore the relationship between talk and action, through integration of discourse and narrative theories and microsociological approaches, such as symbolic interaction. To apply this theoretical integration to the talk and action of an empirical example of IO collaboration.	Conceptual framework was illustrated with case study data from a collaborative IO group consisting of 13 community partners that gave employment services (e.g., counselling) to unemployed people. Data included 13 pre-workshop interviews, notes from a 3.5 day workshop run by one of the researchers, and open-ended survey at end of workshop. No information on data analysis was supplied by the authors.	Developed a model to suggest that action was produced through interactive talk or conversation that developed skills, emotion and *identity*. Specifically, the authors argued that the collaborative IO group discursively constructed a new *collective identity*, beyond that mandated by the government's employment office. That is, through talk these community groups enacted a new story about themselves, a new *identity* as a collective social actor.

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
Clark (1999) [PhD dissertation) Theme 3	Organizations increasingly use strategic alliances to improve their competitiveness. However, few researchers have studied the role of managers' cognitive change, an important part of alliance development. // To study the development of cognitions and actions of top management teams during development of a strategic alliance. To study the factors which facilitate or hinder the alignment of top management team cognitions.	Longitudinal comparative case study of top management teams in two healthcare organizations attempting a merger. Studied the cognitive changes and activities of the managers as they tried to make sense of and develop the merger. Data collected through interviews, surveys, archival documents and direct observation. Made comparisons between and within the two top management teams. Used content analysis to develop codes and then themes, until patterns emerged. Did basic statistical analysis on survey data.	Found that an organization's `character' is fundamentally changed through IO formation. Also, found that *identity* and *image* play a key role in the managers' cognitive change. Top management teams project an *image* to sustain the alliance. This image contributes to formation of a surrogate, transitional *identity*, followed by a *collective identity*, and finally by an emerging, joint future *identity* for the newly formed organization. Managerial cognitions or interpretive schemes develop to support the future alliance's *identity*, as managers begin to believe that the alliance will ensure survival and competitiveness.
Walpole (2000) Theme 3	Different literatures (i.e., institutional theory, organizational theory, higher education theory) conflict in their explanation for how organizations construct an *identity*, and whether that *identity* is consistent, or based on the context. // To study how a university's library and information science department developed a new	Qualitative study using participant observation (resulting in field notes), semi-structured interviews and archival documents through four stages, to develop an understanding of library and information sciences in general, and the merger more specifically. Looked at how three isomorphic forces (coercive, normative, mimetic) exerted pressures on	The library and information systems department constructed an *identity* that was both consistent and contextual. They constructed an identity that was contextual, as it allowed them to meet the expectations of their own discipline (e.g., responsive to practitioners, addressing prominent issues in field,

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
	identity, when it was forced to merge with an education department.	library school's *identity*.	such as split between librarianship and information science), but also to become more similar to the research-focused education department (e.g., stressed research productivity). However, their new organizational *identity* was also consistent, because they presented the same *identity* consistently to each group.
Welleford & Dudley (2000)	Some managers of nonprofit organizations are reluctant to engage in IORs, especially when they are not dominant in those IORs, if their organization would lose its *identity*. // To study whether a community agency that is increasingly involved in IORs is able to maintain a strong organizational *identity*.	Single-case case study of U.S. community action agency working to eliminate poverty. Data included organization publications, the speeches and written work of staff, newspaper publications, along with 33 interviews (13 of past and present board members; 20 with current staff). Read founder's writing about the organization and identified key descriptive phrases about the agency. Then studied which of those words the current participants would use to describe the agency.	Found consistencies in words used to describe the agency (i.e., education - oriented, efficient/effective teamwork, devoted to the public) across staff, board members, and executive director. That *image* was also projected externally, as evidenced by similar phrases used in external publications such as newspaper articles. Interviews and participant observation suggested the agency maintained its *identity* despite its various IO interactions, through its selection, training and mentoring practices.
Labianca, Fairbank, Thomas, Gioia & Umphress (2001)	Need further investigation of link between microprocesses and macro outcomes. // To investigate how	Used multivariate statistics to analyze survey data, aggregated by institution. Received 611 surveys from up to 3 top	Generally, institutions wanted to emulate other institutions that were similar to them. This decision was

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
Theme 1	interorganizational emulation (i.e., a microprocess) is linked to creation of strategic groups within industries (i.e., a macro outcome) (Interorganizational emulation: when an organization tries to at least equal its selected comparison organization(s) along several characteristics)	managers at 372 U.S. postsecondary institutions. Dependent variable (up to three institutions they would choose to emulate); Independent variables (size, type of institution, ownership, church affiliation, region, reputation, *present image, desired future image, type of organizational identity, identity strength*, perceived environmental threat, perceived degree of strategic change). Type of organizational *identity*: utilitarian (economic orientation) vs. normative (values, ideology orientation). *Identity* strength: the degree to which respondents believed faculty and students identified with the institution.	influenced both by structural attributes (e.g., size, type of ownership) and subjective attributes related to *organizational identity* (e.g., reputation, *image, identity type*). However, when environmental change was positive, institutions tended to emulate up, to institutions with a better reputation. In contrast, probably as a protective response, during negative environmental change, institutions tended to emulate down, to institutions with less positive reputations.
Brown & Gioia (2002) Theme 3	Traditional offline businesses must deal with whether and how e-business differs from traditional business. // To provide systematic research on how to lead an on-line division of an off-line organization.	Used an interpretive approach. Conducted 22 semi-structured interviews with top management team members of Fortune 500 organization's internet unit, and job-shadowed the president one day. Analyzed data with grounded theory approach.	Speed and ambiguity were two contextual characteristics that affected leadership and other management processes. Two themes emerged: 1) dealing with tensions with parent about their *organizational identity/image*; and 2) developing into an organization where learning is widely distributed outside leadership.
Lerpold (2003)	Important to understand the processes	Grounded case study of IO alliance	Developed a dynamic model of

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
[conference paper] Theme 1	of change in organizational *identity*. // To develop a process model of organizational *identity* adaptation.	between two European MNCs in the oil industry, British Petroleum and Statoil (Norwegian MNC). Based on 120 semi-structured interviews with a variety of employees at both organizations. Also participant observation of meetings, and two months of quasi-ethnological observations of overseas alliance employees.	organizational *identity* adaptation consisting of three continuous phases (*identification* with a role model organization; *imitation* of the role model organization; and *evaluation* or retrospective sensemaking about the previous two phases). Embedded with a contextual environment, which could also act as trigger to the adaptation process.
Tobin (2003) [conference paper] Theme 1	The empirical literature does not address the process through which *identity* forms during a strategic alliance. // To understand how members of an alliance construct a collective organizational *identity*. To examine the role that identity of the individual organizations plays in constructing a collective *identity*.	Case study of a small, non-profit organization formed by three organizations to bid on a U.S. government contract. Used two distinct samples: (1) people from the strategic alliance, with representatives of each founding organization (n=9); (2) individuals from the three home organizations, with no link to the new organization (n=6). Deductive analysis of interviews, observations of meetings, and documents/archival materials using previous research on definition of *identity* and identity dynamics.	Findings suggested that *identity* developed through a dynamic process that included five areas: (1) history, (2) who we are now, (3) who we want to be, (4) what legal structures (i.e., the contract) and leaders tell us we have to be, and (5) who the customers expect us to be. Both the home organization histories and individual leaders (formal and informal) influenced the identity of the alliance organization. *Critique: No examples provided to illustrate the five areas.*
McKinney & Kahn	In the U.K., the National Lottery	Part of a larger study, which used several	More than half the organizations

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
(2004) Theme 1	provides about 7% of revenue for voluntary sector, and thus is important in sustainability of many organizations. However, disbursement and monitoring of funds has contributed to structural and cultural changes at both sector and organization levels. // To show how Lottery funding from an external stakeholder leads to a change in organizational *identity* in the U.K. voluntary sector.	methodological approaches (questionnaires, semistructured interviews, focus groups, case studies) to study 100 Lottery funded projects. In this paper, focused on small to medium size voluntary organizations that had not received other large grants.	experienced uncertainty or even crises about project feasibility, financial survival, and so on. These crises were related to organizational *identity*, either because external stakeholders' expectations for the organization changed after they received funding, or the funded project challenged the organization's previous practices and capabilities.
Skålén (2004) Theme 3	New Public Management (NPM) programs typically include several ideas (e.g., quality management; measurement of customer satisfaction) originally developed for the private sector. Thus, NPM initiatives are designed to change the identity of public sector organizations to become more like that of a business. Most previous research on this attempt to change the *identity* of a public sector organization has used a neo-institutional approach. // To study the impact of NPM initiatives on organizational *identity*, and to	Qualitative study of a NPM initiative in a Swedish public health authority (PHA), imposed by government. Data included 60 hours of unstructured interviews with employees (administrators, physicians, nurses); participant observation of meetings about NPM initiative; internal and external documents (i.e., newspaper articles) about the initiative. No information given on data analysis techniques.	Found that the NPM reform initiative created a fluid, heterogeneous *identity* for the PHA, not a stable, business identity. This occurred because two actor-groups (old administrators; new management) enacted different identities for themselves, while ascribing alternate identities to the other actor-group. These actor-group identities originated from their own history and cognitive frameworks (i.e., extracted cues about previous reform efforts), but were also influenced by the situation (e.g.,

Authors	Problem Addressed / Central Purpose or Focus of Study	Sample or Participants, & Analytical Tools	Most Relevant Findings
	describe and analyze the process of *identity construction* from a sensemaking perspective.		their perceptions of the ideology held by other group). The organizational *identity* each actor-group ascribed to the other hindered the success of the NPM initiative that had been imposed by the external IO actor (i.e., government).

attract more resources (Geist, 1995; Levy, 1982). In the sensemaking literature, Ring and Van de Ven (1994) argued that, through sensemaking, organizations jointly developed an understanding of their motivations for engaging in an IOR. Finally, within the actor-network theory literature, Callon (1986b) argued that actors actively constructed their identity, through interaction with other entities.

A number of empirical articles illustrate my first theme, as shown in the first column of Table 4.1. However, one study will serve as an exemplar. As part of a larger study of 54 voluntary organizations, McKinney and Kahn (2004) examined several small and medium sized voluntary organizations in the U.K., which relied on large grants (i.e., over £60,000) from the National Lottery for new projects. Through questionnaires, semi-structured interviews, and focus groups with the project managers, the researchers examined how Lottery funding changed the organizational identity of these voluntary organizations. The authors found that over half the organizations experienced greater uncertainty about the feasibility of their projects, or even their own long-term survival, as they tried to manage their unusually large grants.

McKinney and Kahn (2004) argued that this uncertainty was linked to the organization's identity as voluntary. That is, the Lottery funding challenged both their shared understanding of their ongoing need for monetary support, and their organizational capabilities. Thus, some of the organizations believed the expectations or motivations held by external stakeholders changed as a result of their Lottery funding. For example, some organizations believed other actors viewed them as more credible or legitimate upon receiving Lottery funding. However, other project managers said that stakeholders now believed they were `cash-rich'. As a result, they found it difficult to obtain funding for their projects and support activities. In other cases, project managers believed the Lottery funding challenged the organization's existing capabilities and practices. That is, after receiving a large Lottery grant, they sometimes found that they did not have the required skills and resources to complete the project.

The second theme I extracted from the literature is that **how identity is understood influences how the external environment of the organization is**

perceived. That is, after returning to the literature, I developed the belief that the organizational identity of the three sites was like a lens, through which the managers extracted and interpreted cues about external actors. In the following paragraphs, I discuss the material that contributed to development of this theme.

As discussed earlier, Gioia and his colleagues (Corley et al., 2000), argued that organizations project their identity or self-image to external actors, and then may alter aspects of that identity as they react to the image that those external actors reflect back to them. This is important, because it suggests that the manager develops an interpretation of how current and future IO partners understand its unique characteristics. In a similar argument, Gioia and Thomas (1998, in Bouchikhi, et al.) suggested that organizational identity and image provided an interpretive lens through which managers developed an understanding of issues in the organization's external environment.

In Chapter Three, I presented the key arguments of Weick's (1995) sensemaking approach to organization studies. According to this perspective, intrasubjective sensemaking occurs as individuals construct their identity through reflection on their interpretations of the external environment. Thus, sensemaking occurs when we notice a surprising cue or event. We develop a plausible interpretation of that cue, based on our perceptions of other events or issues. Collective sensemaking occurs when we draw upon cognitive scripts (Gioia, 1986), based on our stocks of knowledge or institutionalized beliefs about everyday life, to make sense of social interactions (e.g., Berger & Luckmann, 1966; Schutz, 1967), while we continue to construct our identity.

Thus, I argued that the facility managers at my three field research sites could draw on their cognitive scripts about IO actors to interpret the site's IORs. I suggested that those managers developed their stocks of knowledge about IORs through their own experiences in managing IORs at the sites. Further, I also argued that the facility managers' interpretation of the cues they extracted about current and future IO partners would reflect elements that various content-based IO theories (e.g., RDT) would propose as significant. Those interpretations would also continuously construct the site's identity (e.g., as "The Pretender"). Thus, my review of the literature suggested that organizational identity acted as a filter or lens through which the manager interpreted external actors, and external actors interpreted the actions of the site. At the same time, managers would develop an interpretation of potential IO partners that reflected key elements identified by content-based IO theories. If we view those groups and organizations as collective social actors, it is reasonable to expect that the facility managers would extract and interpret cues about other actors' *motives* for interacting with the site. The empirical exemplar of this theme is Dutton and Dukerich's (1991) research on the interactions between the Port Authority of New York and New Jersey, and local homeless people, discussed earlier in this chapter.

The third and final theme I developed is that **organizational identity influences the outcomes of IORs**. In Chapter Three, I summarized the relevant negotiated order literature, a process-oriented perspective that we can use to understand IORs. Within that perspective, Geist (1995) argued that organizations could use negotiations to develop a more acceptable identity and thus attract needed resources. For example, Levy (1982) told us how hospices for the dying used several tactics, such as letters of support, to negotiate identities as healthcare organizations with a legitimate need for resources to care for dying people. This is important, because it suggests that an organization's identity, or its unique attributes, may prevent it from forming and maintaining successful IORs. That is, identity could hinder the organization's efforts to form IORs to attain its own goals, such as access to necessary resources. Similarly, as mentioned earlier in this section, Scott and Lane (2000) theorized that if an external stakeholder made a negative appraisal of an organization's identity, it could make it difficult for that organization to achieve its goals.

Several other empirical sources also supported this theme to a certain extent, as they suggested that identity will influence the outcome of interactions among collective social actors (e.g., departments, organizations). One of these empirical sources will serve as an exemplar. Walpole (2000) looked at the link between identity and development of a successful IOR between two departments in a postsecondary institution, using participant observation and semi-structured interviews. Specifically, the author studied how isomorphic forces (DiMaggio & Powell, 1983) exerted pressure on the library and information science department. Specifically, the library department was formerly oriented toward the library profession, but after its merger with an academically-oriented education department, it developed a new, hybrid identity. Walpole argued that the library department's new identity was contextual. Thus, it emphasized academic issues when it interacted with members of the education department, while it emphasized librarianship when it interacted with members of the library profession. That is, the library department altered and contextualized its identity, to develop a successful merger, a specific type of IOR.

The Framework

The final conceptual framework consists of three main arguments, developed through my exploration of the initial field material and my review of the literature on identity and IORs. With this second conceptual framework, I suggested that identity construction was the key to theorizing about enactment of IORs, in a way that allowed me to focus on both the *processes* and *content* of IORs.

First, the literature suggests that organizational identity is continuously constructed through ongoing interactions with external actors (e.g., Albert & Whetten, 1985; Gioia, 1998). As I reviewed my initial field material, I began to see each of the three sites as collective social actors. Theory tells us that organizations are collective social actors that are engaged in behaviour based on their primary motive, purpose or objective (Aldrich, 1999; Brunson & Sahlin-Andersson, 2000; Crozier & Friedberg, 1995). An organization's identity, or the meaning that most members hold for that organization, provides its motive, purpose or objective. After reviewing the identity and IO literature, I developed the belief that each site's identity was constructed and sometimes contested through its ongoing enactment of its interactions with other social actors in its external environment (Scott & Lane, 2000). That is, I believed that the organization had an identity that was central as its IORs were enacted.

Second, the literature also suggests that an organization's identity acts as a filter or lens for interpretation of the interorganizational environment. That is, the site's identity becomes the context in which the facility manager interprets the interests or goals of other IO actors (Gioia & Thomas, 1998, in Bouchikhi *et al.*; Dutton & Dukerich, 1991). Thus, the site's collective identity was pivotal in understanding how the site identified potential IO partners. The facility manager's cognitive scripts of interorganizational theory also influenced her interpretation of other IO actors' interests or motives for interacting with the site (Gioia, 1986; Weick, 1995).

For example, reflecting key elements identified in RDT, the manager might develop interpretations about the facility's resource base, focusing on the site's dependence on or autonomy from external actors. Thus, she might reflect on the facility's need to access key resources, such as financial assets, from external actors, or vice versa. Such an interpretation may incorporate an understanding of power-dependence, acknowledging the site's loss of power through dependence on another actor. She might also reflect on ways to manage relationships with external actors, such as developing a mutually beneficial IOR with a powerful local community organization, which might allow both entities to achieve their goals.

Alternatively, a facility manager's interpretation of external actors may reflect key elements identified in institutional theory. Thus, we would expect him to reflect on the legitimacy of the site's IO interactions, or the activities of external actors. For example, he might mention certain coercive, normative or mimetic pressures that direct the site to interact in a particular way with external actors. Similarly, the manager might discuss the taken-for-granted obligations that the site, as a public sector organization, must exhibit in its IO interactions.

Finally, a facility manager's interpretation of external actors may reflect key elements identified in stakeholder theory. Thus, the manager might attribute certain interests to an external stakeholder. For example, she might suggest that a certain actor has economic or political interests in furthering an IOR with the site. In addition, we could expect a manager to reflect on the relevance or salience of an IO partner's claim on the site. More specifically, she might suggest that a certain actor does not have a legitimate claim, that one IO partner is more powerful than another, or that an actor has an urgent claim that must be addressed quickly.

Finally, my review of the literature suggests that organizational identity is linked to the manager's interpretation about the success of its IO interactions. Thus, the facility manager's interpretation of external actors' motives will either reconstruct or contest the site's identity (Scott & Lane, 2000). The literature suggests that `successful' IORs, ones which allow an organization to achieve its own goals, will not be formed or maintained with actors that contest its organizational identity or understanding of self (Levy, 1982; Skålén, 2004; Walpole, 2000).

Summary

In this section, I described how I developed my final conceptual framework, based on my initial field material and the literature on identity and IORs. In the last section of this chapter, I describe how I explored empirically the utility of the final conceptual model, as I analyzed interviews of government employees at the three cultural organizations. However, in the next section, I describe the identities that I ascribed to those organizations.

The Identities of the Three Sites

In Chapter One, I described my initial fieldwork at the three Southern Alberta cultural sites. I also described how I developed the belief that each site was a collective social actor, as I explored and reflected on my field material. I argued that each site had a unique organizational identity, which I could encapsulate with a name. As stated in Chapter One, I developed these names, based on observations I made during my initial field research and through conversations with other members of the research team. Thus, they effectively serve as shorthand for my own interpretation of each site's identity. In this section, I provide further historical information on each site. I also provide a more detailed description of each site's unique identity, with supporting evidence from my field material. I begin with a discussion of FSIC as a collective social actor that I called `The Pretender'.

Frank Slide Interpretive Centre as `The Pretender'

In this subsection, I build on the background information about FSIC that was provided in Chapter One. I begin with a description of FSIC's historical background and key community stakeholders. The subsection concludes with an expanded discussion of the site's organizational identity.

The Municipality of the Crowsnest Pass. FSIC is located within the unique community of the Crowsnest Pass. In 1979, the existing towns, villages and hamlets in Alberta's Crowsnest River Valley amalgamated to form one local government, called the Municipality of the Crowsnest Pass (Alberta Economic Development and Trade (AEDT), 1989b). The towns of Bellevue, Blairmore, Coleman, Frank and Hillcrest stretch about 15 kilometres (9 miles) along Highway 3 through the Pass, and include a variety of businesses, such as campgrounds, shops, motels and a museum (Anderson & Turnbull, 1983b; Welch & Payne, 2002a).

The Crowsnest Pass is named after nearby Crowsnest Mountain (Anderson & Turnbull, 1983b; Welch & Payne, 2002a). Many stories exist about the origin of the name (Anderson & Turnbull, 1983b). One story suggests that Crow and Blackfoot First Nations groups fought nearby (Anderson & Turnbull, 1983b; Boles, 2002). The Blackfoot managed to trap and kill the Crow in a `nest' at the bottom of the mountain. Thus, according to this story, Crowsnest Mountain was named to memorialize the battle victory of the Blackfoot. However, most people believe the mountain's name originated from a Cree phrase, which refers to the crows' nests at the mountain (Anderson & Turnbull, 1983b).

In 1845, Father Jean de Smet, a Roman Catholic missionary, was the first to make note of the coal found in the Kootenays, west of what is now the Crowsnest Pass region (Anderson & Turnbull, 1983a). In 1873, Michael Phillips, a former clerk with Hudson's Bay Company, was the first European to explore the Crowsnest Pass area. Phillips cleared a trail through the Pass in 1879. By the late 1800s, several European ranchers and `squatters' already inhabited the region (Crowsnest Pass Historical Society [CPHS], 1990). However, the Pass became more accessible to larger numbers of settlers in 1897, when the CPR built a branch line through the region (CPHS, 1990; Welch & Payne, 2002a).

The construction of the CPR branch line contributed to the early economic boom of the Crowsnest Pass region (Oldman Intermunicipal Service Agency (ORISA), 2001). The line provided transportation for both mining and logging companies. Most importantly, the arrival of the railway allowed mining companies to begin harvesting the massive coal deposits in the region (Anderson & Turnbull, 1983a). The deposits ran along at least 45 miles of the 60-mile long mountain pass, and proved to be superior for coke production to fuel the railway engines.

Thus, the early economy of the region was based on coal mining for the CPR and other markets (Welch & Payne, 2002a). Mines developed quickly, and several communities soon sprang up (CPHS, 1990). Many towns in the Pass region were surveyed, built and owned by the mining companies, to house workers employed in the coal mining industry (ORISA, 2001; Oldman River Regional Planning Commission [ORRPC], 1969). Consequently, the region consisted of a series of small towns spread along the river valley, for easy access to the coalmines. For example, the Crowsnest Pass included 10 communities within only 22 kilometres (14 miles) (Anderson & Turnbull, 1983a). On the Alberta side of the Pass, mines were located at Bellevue, Blairmore, Coleman, Frank, Hillcrest, Lille and Passburg.

By 1911, the population of the Crowsnest Pass in both B.C. and Alberta was approximately 11,000 (Turner, 2000b). The region's fast-growing coal mining industry attracted people from Eastern Canada, the United States and Europe. Thus, communities in the Crowsnest Pass included people from two main language groups (Cousins, 1981). The largest group was the Slavs, composed of Poles, Russians, Ukrainians, Czechs, Slovaks, and Yugo-Slavs. The other language group included English-speaking people from Britain, Eastern Canada and the United States, although Italian-speaking people formed a significant minority. Most English-speaking residents originated from mining areas in their home regions or countries. For example, British residents came mainly from Lancashire and Yorkshire, while Eastern Canadians were usually from Nova Scotia.

Since its beginnings, the Crowsnest Pass has experienced the booms and busts of a resource-based economy (ORISA, 2001). World War II created a huge demand for coal from the Pass (Langford, 2002). This demand continued through the early 1950s, due to post-war economic growth (Langford, 2002; ORISA, 2001). However, with the advent of Alberta's oil boom in 1947, railway locomotives switched from coal to oil (ORRPC, 1964). Orders for Crowsnest coal slowed by the mid-1950s, after the CPR replaced its steam locomotives with diesel ones (Langford, 2002). The coalmines of the Crowsnest Pass never rebounded from this severe setback (ORRPC, 1964). By the end of the 1950s, only the mines at Coleman and Michel had meaningful numbers of working union members (Langford, 2002).

Demand for coal remained low in the 1960s (ORISA, 2001). In 1961, the Crowsnest Pass region began to diversify into other natural resources, with the establishment of processing plants for natural gas and sulphur recovery (ORRPC, 1969). The local coal mining industry grew in the 1970s, as international coal markets developed (ORISA, 2001). However, a recession in the 1980s finally led to the industry's decline. In 1983, the last coal mine was closed in the Alberta portion of the Crowsnest Pass, depressing the local economy and marking the end of an historic Alberta industry (Anderson & Turnbull, 1983b; Welch & Payne, 2002a). Remaining coal reserves on the Alberta side are estimated at 5 billion tons, and at 6 billion tons on the B.C. side. Mining continued on the British Columbia side, with large strip mining projects and safer underground mining techniques.

The current economy of Alberta's Crowsnest Pass includes mineral extraction, tourism, logging and gas processing (AEDT, 1989b). The Pass region is also known for its big game hunting of Bighorn sheep, grizzly and black bears, moose, elk and deer, in addition to excellent trout fishing. However, in recent years, the municipality has focused on tourism development as an important part of its economic base (Welch & Payne, 2002a). Popular tourist attractions in the Crowsnest Pass include the Frank Slide Interpretive Centre, the Bellevue Mine and the Hillcrest Mine (ORISA, 2001).

In 1986, the municipal council founded the Crowsnest Pass Ecomuseum, to preserve the region's mining history and its related natural and historical features (Dawson, 1995). The `museum' was the region, rather than a specific building. The group's first priority was to repair portions of the Bellevue Mine. They hired former miners to help restore several hundred metres of tunnel, and the Ecomuseum began to offer underground tours during the summer. Ten thousand people visit this historic site each year, and the society hopes that figure will increase substantially (ORISA, 2001). The Ecomuseum's second priority was preservation of the building that housed the *Coleman Journal*, a Pulitzer-prize winning newspaper that published from 1920 until 1970 (Dawson, 1995).

Labour movement in the Crowsnest Pass. Working conditions in mines were typically dangerous (Turner, 2000a). However, the Crowsnest Pass mines were especially hazardous, because of dangerous gases. Between 1907 and 1967, mining disasters killed over 500 miners in the Crowsnest region (Anderson & Turnbull, 1983a). Canada's worst mining disaster occurred in 1914, when an explosion at the Hillcrest Mine killed 189 miners (Welch & Payne, 2002a).

Working in such dangerous conditions, with the constant threat of injury or death, miners have always been concerned about safety issues (Dawson, 1995). However, they have not always been able to communicate those concerns to management, without the support provided by a strong union. Miners in the Crowsnest Pass believed strongly in union values (CPHS, 1990). Shortly after mining began in the area, the Western Federation of Miners had organized in Fernie, on the B.C. side of the Crowsnest Pass. In 1903, the Union committed to the United Mine Workers of America (UMWA), and organized several mines on the Alberta side.

The coal miners' struggle to improve their working conditions often led them to align with the ideals of socialism, viewed among the general population as too radical (Cousins, 1981). Some organized labour unrest in the region began after the First World War, when the coal industry was near collapse due to fluctuating world markets (CPHS, 1990). Mine owners and managers instituted large lay-offs and wage reductions. In May 1919, the local miners went on strike (Cousins, 1981). The situation became more unpleasant, when the mine owners fired or disciplined miners, and asked the RCMP to observe "agitators" (p. 126).

Many of the miners left the UMWA union, and joined the One Big Union (OBU), a socialist organization. The One Big Union, which existed between 1919 and 1956, was the Canadian version of revolutionary industrial unionism (Seager, 2002). This was an international labour movement that wanted all labourers to unite into one large union, to put an end to capitalist ownership of production. In Canada, the OBU movement was a coalition of union members and sympathizers, as well as socialists. Unlike the U.S.-based Workers Unity League (WUL), the OBU did not have direct links to the Communist party in Russia. In 1921, OBU miners from the Crowsnest Pass elected an OBU representative to the Alberta Legislature. However, the mine companies formed an alliance with the previous union, and offered large wage increases to those who returned to work and rejoined the UMWA (Cousins, 1981). One by one, several union locals returned to the UMWA, and eventually the OBU was defeated.

Nevertheless, in 1925, the UMWA was replaced by the Mine Workers' Union of Canada (MWUC), a strange combination of both left-wingers and moderates (Dawson, 1995). By 1931, the left-wingers in the MWUC had become more powerful, and the union joined the militant Workers' Unity League (WUL), a newly formed union developed by the Canadian Communists. At the same time, Pass miners were experiencing serious underemployment and filing grievances over blatant scheduling favouritism by pit bosses.

In 1932, all but one of the mines in the Crowsnest Pass went on a bitter, seven-month strike, organized by the `radical' WUL (CPHS, 1990; Finkel, 2002). The strike began in Coleman, where the miners demanded that the local mining companies divide available work among all miners, instead of a select few (Finkel, 2002). However, the coal companies refused to meet with the activist union, and the strike extended throughout the Crowsnest Pass. Many confrontations occurred, and the RCMP had to break up confrontations between `scabs' and the striking miners. Feelings ran deep in the Pass community, with families and even entire towns arguing with each other over labour issues (CPHS, 1990).

The well organized strike lasted until Labour Day, with neither side especially triumphant when it ended (Dawson, 1995). The miners' demands went unanswered, and they and their families continued to resent not only the mine owners, but also the RCMP and provincial authorities (Finkel, 2002). The Pass continued to develop `left-wing' leanings, and during much of the 1930s, the town of

Blairmore elected a town council that supported the WUL (Finkel, 2002; Seager, 2002). According to Cousins (1981), a respected local author, the community of Blairmore had elected the WUL primarily to reduce past administrative corruption, and found it difficult later to live down their "red" label.

FSIC as `The Pretender' in initial field material. I saw the Frank Slide Interpretive Centre as a collective social actor called "The Pretender", a name that reflected my interpretation of its unique identity. As shown in Tables 1.5 and 1.6, a pretender is "a person who claims a throne or title" (Barber, 1998, p. 1146). Several historical figures (e.g., James III, The Old Pretender) had this phrase added to their name, to signify their aspirations for a throne or title, considered illegitimate by the prevailing status quo but commanding loyalty among a band of followers or believers. I believe that definitions of the verb `to pretend' further extend our understanding of the FSIC's unique identity. Meanings of this verb include "to lay claim to", "to profess to have (a quality etc.)", and to "aspire or presume; venture" (Barber, 1998, p. 1146).

First, I am suggesting that the FSIC, as a collective actor called The Pretender, professed to interpret the Frank Slide. Indeed the facility's name suggested that it focused on interpreting the events surrounding the Frank Slide. Although the site professed to interpret the Frank Slide, most of the exhibits described the broader cultural history of the Crowsnest Pass. An excerpt from my field notes, written during my initial fieldwork, supports this assertion.

> The original name of the Centre was supposed to refer to the Crowsnest Historical Corridor. However, the local MLA intervened, and stated the Centre would attract more visitors if it were named after the Frank Slide. [The facility manager] said that occasionally visitors complain, stating that the facility's name is misleading. They believed the entire Centre would be devoted to the Slide. Instead, most exhibits focus on the general history of the Crowsnest Pass, particularly coal mining. (Field Notes, Monday, July 13, 1998)

Second, I am also suggesting that as The Pretender, the FSIC presumed to act on behalf of the Crowsnest Pass region. My initial field material suggests that the people of the region did not want the site to act on their behalf, because they did not value the history that the site wanted to preserve and interpret. The following excerpt from my field notes illustrates that point.

> [The facility manager] told me that the Crowsnest Pass residents "don't really care about the Centre." When I probed, [she] stated that there is so much history in the area, the history of one rock slide, or one colliery is relatively unimportant on its own. For instance, although a local society is trying to preserve the Coleman Colliery, the local townspeople support "tearing it down." The people of the Crowsnest Pass do not seem to support tourism as an industry. (Field Notes, Monday, July 13, 1998)

A lengthier excerpt from my field notes describes a preservation-related trip to the old Hillcrest Mine site. The facility manager, interpretation officer and I were hiking to the old mine, when we encountered two local residents. They joked about the building ruins we would find there, all that remained from Canada's worst mine disaster.

> A couple of middle-aged men in work clothes were riding in the truck. . . . They stopped to say hello, and asked us what we were doing. The driver asked if we were looking at "old rocks", perhaps thinking we were tourists visiting the old mine buildings. . . . We all took his comment as denigrating the ruins of the mine buildings, and [the facility manager] answered in a firm voice "We're here to look at historic buildings." She looked him directly in the eye, and nodded emphatically as she stated this. (Field Notes, Wednesday, August 5, 1998)

In short, local residents saw the historic buildings as "old rocks", rather than a valued part of their history. They had a sense of community and cohesiveness without the assistance of the museum's representations. The historical mining work of the area was dirty and dangerous, a history the residents did not value nor wish to preserve.

Head-Smashed-In Buffalo Jump as 'The Trickster'

In the mid-1970s, Dr. W. J. Byrne, a manager in the department of Alberta Culture, first approached the Piikani Nation with the idea that they should collaborate to preserve and interpret the artifacts at Head-Smashed-In Buffalo Jump (Brink, 1995).[1] By 1987, the interpretive centre had opened to the public. In 1988, only one year after its official opening, the Centre provided an estimated annual economic spin-off of $3 million to the local region ("Chronicling," 1990).

HSIBJ was built into the hill next to the buffalo jump, to avoid disturbing the natural surroundings of the buffalo jump ("Chronicling," 1990). The Centre had three purposes: to represent the Plains First Nations culture, to describe the traditional use of the buffalo jump, and to display an example of archaeological science (Brink, 1995). To accomplish these goals, the Centre had exhibits on five different levels, beginning at the top of the building ("Chronicling", 1990; Reid, 1992). The first level was called `Napi's World'. As mentioned earlier, Napi is the mythical creator-god of the Blackfoot peoples, as told in several Blackfoot legends. Exhibits on this level tell a story about the prehistoric ecological balance of the region. On the second level, `Napi's People', the exhibits presented and interpreted the prehistoric or traditional lifestyle of the Plains First Nations peoples. The third level was called `Buffalo Hunt'. It described how the buffalo hunt was undertaken, as well as the importance of the buffalo for all facets of traditional Plains First Nations' life. Exhibits included a model showing the position of the collection basin, drive lanes and cliff. The fourth level, called `Cultures in Contact', discussed the impact of contact with European trappers, traders and settlers. Although Europeans brought useful items such as guns and horses, they also exposed Plains First Nations peoples to deadly diseases and nearly exterminated the buffalo. Thus, the exhibits described the severe impact on the traditional lifestyle of the Blackfoot peoples. Finally, the fifth level discussed the role of archaeological science in helping us to understand and preserve the buffalo jump's history.

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[1] Piikani (Peigan) legend explains how they began to use the buffalo jump (Reid, 1992). According to legend, their distant ancestors had subsisted on berries, roots and small animals. They did not hunt the numerous buffalo, because they believed the buffalo would attack and eat them. One day Napi, the trickster creator-god of the Piikani, saw several dead, partially eaten people, presumably from an encounter with the buffalo. Napi decided to teach the people how to hunt them. He led the buffalo to the nearby Porcupine Hills, and made weapons for the Piikani to use against them. Napi taught the people how to use the buffalo jump to kill the buffalo, and then how to scrape their hides with stone flakes.

First Nations participation. Local First Nations peoples have had significant participation in the planning and ongoing operations of the Centre. First, after discussions in the early 1980s, the provincial government decided that they should include the First Nations perspective in the site's design (Brink, 1995). They wanted to include "more than just a textbook view of the story of the buffalo jump" (p. 3). Thus, the Archaeological Survey of Alberta began a series of interviews with Elders from the nearby Piikani Nation, to collect examples of traditional knowledge about the buffalo jump. By the mid-1980s, they had formalized the Piikani Nation's participation in the development of the interpretive centre. Through the Piikani cultural centre, they arranged for Elders to act as advisors, "to review proposals for displays, artifacts, text, and as a source of research information on themes and storyline for the interpretive centre" (pp. 4-5). Thus, the provincial government consulted the Elders during the planning stages, as they decided on the interpretive centre's key themes ("Chronicling," 1990). Later, they also consulted Elders about the content of exhibits and their accompanying texts. At an early stage, planners also decided to incorporate myths about Napi, the Blackfoot trickster figure, into the text at the site. These Napi stories provided an alternative, non-Western interpretation of Blackfoot history and the artifacts at the Centre.

Second, after the Centre was constructed, whenever staff installed or removed representations of a sacred item such as the medicine bundle, Elders were notified so that they could observe. Periodically, Blackfoot Elders also blessed the Centre and its staff through traditional Blackfoot purification ceremonies. Third, the Centre also employed a cross-cultural mix of staff. During the summer, when the facility is fully staffed, approximately half the employees are First Nations. Policy prescribed that all interpretation officers, who conducted guided tours of the Centre, must be Blackfoot-speaking.

Despite ACD's efforts to involve local First Nations peoples in the design and operations of the Centre, they encountered a variety of issues. Many of those questions probably arose because the facility has a dual mandate, both to preserve the First Nations culture and to attract tourists to the facility ("Chronicling," 1990). For example, based on her field research at the Centre and among members of the

Piikani Nation, Notzke (1996) noted that the Centre continued to struggle with several important concerns.

> Throughout the 1990s, other questions have arisen – questions of aboriginal employment and personnel management, benefits to the neighbouring Peigan Reserve, freedom for aboriginal guides to present their own storyline, expanded involvement of the centre in cultural tourism activities, image concerns and the development of successful marketing strategies that do not employ stereotypes. (Notzke, 1996, p. 56).

Local communities of the site. HSIBJ regularly interacted with two key local communities: the Blackfoot Confederacy, especially the Piikani Nation and Blood tribe, and the town of Fort Macleod. Thus, in this subsection I provide additional background information on those two communities.

The Blackfoot Confederacy includes the three tribes in the Blackfoot Nation, as well as their long-term allies, the Sarcee (Tsuu T'ina) and Gros Ventre (Dempsey, 2002a). The Blackfoot Nation itself is comprised of the Blood (Kainai), Peigan (Piikani) and Blackfoot (or Siksika). The people in the Blackfoot Nation call themselves literally "prairie people", and assert that they have long occupied the western North American prairies. This assertion is verified through the archaeological record, which shows they occupied their claimed territory since the mid-1700s. The traditional economy of the Blackfoot Nation was based almost entirely on the buffalo, which they hunted primarily in northern Montana and southern Alberta.

In 1877, the Blackfoot Nation signed Treaty 7 with the Canadian government. Thereafter, the Blood (Kainai), Siksika and North Peigan (Piikani) bands each settled on different reserves in southern Alberta, while the southern Piegan tribe settled on a Montana reservation (Dempsey, 2002a). Until World War II, the Blackfoot largely retained their language and culture, probably due to relatively large populations on the reserves. However, traditional culture and language has rapidly declined since then.

Traditionally, the Piikani (North Peigan) were a nomadic people, who hunted buffalo for sustenance (Dempsey, 2002c). However, after they signed Treaty 7 with the Canadian government, they settled on a southern Alberta reserve, between Pincher Creek and Fort Macleod. Today, the Piikani Nation's reserve economy largely consists of farming, ranching and small industry. Many members of the band also work and live outside the reserve boundaries. The Blood tribe first settled on a reserve near Calgary, next to the Siksika tribe (Dempsey, 2002b). However, a few years later, they moved further south to their current spot between southern Alberta's Belly and St. Mary rivers, and founded Canada's largest First Nations reserve. The Bloods are known as hardworking people, who have largely held onto their traditional values. The Blood reserve's economy includes a successful ranching industry, begun in the 1890s, as well as large-scale farming.

The Town of Fort Macleod is located 144 kilometres (89 miles) south of Calgary or 48 kilometres (30 miles) west of Lethbridge (AEDT, 1989c; Bent & Ragan, 1990). In October 1874, a group of Northwest Mounted Police (NWMP) from Manitoba arrived in what is now southern Alberta, near the current location of Fort Macleod. Under the command of Colonel James F. Macleod, several of the mounted police remained in the area. The group build a fort, named for the Colonel, to formalize European settlement of the area.

In the 1880s, Fort Macleod was the centre of the region's ranching industry (Town of Fort Macleod, 2003a; 2003b). Businesses in the town supplied the needs of the NWMP barracks, the local ranchers and the nearby Blood and Piikani reserves. Fort Macleod was most prosperous between 1906 and 1912, as a regional business centre. Indeed, by 1910, the town's population had grown to 2,500 people. The CPR stimulated economic growth in the area, and the town optimistically promoted itself as the `Winnipeg of the West'. However, in 1912, the CPR relocated its employees to Lethbridge, and more than 200 jobs were lost. When the Great War began, Fort Macleod entered an economic depression that essentially continued until the 1970s. Since 1974, the town has experienced slow economic growth. Today, the local economy is based mainly on agriculture and tourism (AEDT, 1989c). Each year, over 60 thousand people visit the town's historic Main Street and the Fort Museum, a replica of the original NWMP fort (Pannekoek, 2002b).

HSIBJ as `The Trickster' in initial field material. I believed the name "The

Trickster" aptly encapsulated my interpretation of the identity of HSIBJ. The trickster is one of the most common characters in mythology and culture around the world (Christen, 1998). The trickster character is sometimes human, but more typically it is an anthropomorphized animal (Thompson, 1966). That is, tricksters usually take an animal-like form, such as a coyote, raven or hare (Minderhout, 1995). However, they talk and behave like a human being. Tricksters are distinguished by their ambiguous dual nature. According to Christen (1998), a society may perceive the trickster as both obscene and powerful, or joker and culture-hero. Similarly, Kuiper (1995) argued that the trickster-hero "may be regarded as both creator god and innocent fool, evil destroyer and childlike prankster" (p. 1130; see also `Trickster tale', 1998, p. 932).

The trickster is known for his cunning ability to deceive others to attain his own goals (Ruoff, 1990; Sullivan, 1986). However, tricksters typically get into trouble as their schemes backfire. Indeed, in some trickster stories, the people benefit from the trickster's deceitfulness or theft (Herskovits et al., 1972). Some authors have suggested that tricksters will also act as social commentators, mocking both societal rules and powerful people, such as government workers and priests. Christen (1998) argued that these trickster tales show people that others may abuse their power, and that people can empower themselves. In this sense, the trickster holds seemingly incongruous roles, as entertainer and political activist.

The capricious trickster also may act as a `culture hero', a figure that represents "the ideal of a people" (Kuiper, 1995, p. 1130). In this role, the trickster's purpose is to provide guidance to the people (Bonnefoy, 1991). Thus, the culture hero provides the "benefits of civilization," including fire, water, plants, animals, and language (p. 1153). However, the culture hero also provides rituals and other cultural characteristics. "As such, [the trickster] plays the part of another mythic archetype, the transformer, or culture hero, who in a mythic age at the beginning of the world helps shape human culture into its familiar form" (Sullivan, 1986, p. 45).

Some cultures include trickster stories that describe this character as both creator-god and destroyer. In North American First Nations' societies, the trickster figure is usually also the `culture-hero-transformer' figure (Herskovits et al., 1972).

Napi, or Old Man, is the creator-god of the traditional Blackfoot culture and is also their trickster figure (Peat, 1996; Ruoff, 1990).

In my view, the name "The Trickster" reflected the ambiguous identity and actions of Head-Smashed-In Buffalo Jump. (See also Tables 1.5 and 1.6). HSIBJ was clearly a culture hero for the Blackfoot people. For example, the site provided employment for several members of the nearby Piikani (Peigan) Nation. Specifically, all interpretive officers had to be members of the Blackfoot Confederacy, so that they were knowledgeable about the Blackfoot culture. HSIBJ also sponsored an annual powwow that attracted about 8,500 visitors, including several bus tours. According to a Piikani employee, HSIBJ's powwow was more traditional than many others, such as that held on the Blood reserve.

However, as an ambiguous social actor that I called The Trickster, HSIBJ showed some characteristics that were antithetical to those of a culture-hero. For example, my field notes included some evidence that not all Blackfoot accepted the site as a culture-hero. Indeed, the Piikani Nation believed that the buffalo jump and the surrounding area still belonged to them, although it was outside the reserve's current boundaries. As a result, members of the Piikani Nation often resented the site's economic success, as suggested by the following excerpt from my field notes.

> In the recent past, about three or four years ago, the Peigan Nation suddenly asked for a portion of the [facility's] admission receipts, stating that the site was 'selling our culture'. [The facility manager] handled this by waiting them out. Eventually, the Peigan Council membership changed, and the issue died. In exchange, however, the Centre did offer to continue scholarships to post-secondary native students. They also pointed out that under the current arrangement the site employed a large number of natives. If they were forced to share admission fees, they might need to scale back the number of employees. (Field Notes, July 8, 1998).

Remington-Alberta Carriage Centre as 'The Deceiver'

In the fall of 1985, a Steering Committee was struck to investigate the viability of building a permanent facility to display the carriage collection donated by Don Remington (Remington Carriage Collection Steering Committee (RCCSC), 1986). The project was commissioned in late 1985, with financial assistance from Alberta Culture, and technical assistance from the Historic Resource Division. A year later, the Steering Committee recommended the construction of an interpretive centre in Cardston.

The Centre would house a world-class collection comprised of Mr. Remington's donation, along with long-term loans of the carriage collections held by three other Alberta cultural organizations: the Reynolds Alberta Museum, the Glenbow-Alberta Institute, and the Provincial Museum of Alberta (RCCSC, 1986). The PMA's carriage collection included about 40 vehicles, similar to those donated by Mr. Remington. The collection held by the Glenbow-Alberta Institute included over 120 vehicles, but was more diverse, and included several vehicles of historical importance to Albertans, such as carts used by the Mormons in their westward trek. The committee argued that the combined carriage collection would be world-class, one of the top three in North America. The proposed centre would interpret the collection of horse-drawn carriages, and provide other horse-related programs.

The budget for the project was $12.6 million (RCCSC, 1986). The province would fund over $9 million of that amount, while the Town of Cardston agreed to donate land worth $1.1 million dollars. The budget also included $2.5 million, necessary to round out the collection with other types of horse-drawn carriages. However, the Steering Committee projected that the Centre would attract up to 180,000 visitors in the first year and 270,000 visitors in the fifth year of operations. They saw Cardston as a `gateway' to the province, believing that the carriage centre would attract numerous U.S. visitors, who would then travel to other provincial historic sites and tourist destinations. At the projected rate of growth, the provincial government would recover its capital investment within three years. The committee also projected a large, direct economic impact for Cardston and the entire region – $2.6 million in the first year, and $3.9 million by the fifth year of operations.

However, only three years later, Alberta Tourism (1989) argued that the projected visitation figures in the Steering Committee's proposal were too optimistic. They suggested more realistic projections of 150,000 visitors in the first year, and

180,000 by the fifth year of operations. At the same time, they downgraded the estimated spin-off economic benefits for the region, projecting Cardston area residents would share in annual economic benefits of $2.5 million from expenditures by RACC and its visitors.

Alberta Tourism (1989) was more pessimistic, because they believed that RACC would not have the broad-based appeal of the other historic sites. It offered a more detailed, but highly specialized experience. As well, most motor vehicle traffic in the region tended to bypass Cardston. Thus, despite Cardston's proximity to the large U.S. market, RACC's primary target market was either local people or those deliberately travelling to or passing through Cardston. The department suggested that RACC should try to appeal to a broad range of repeat regional visitors, through special events and broadly-based interpretive programs, such equestrian events and heavy horse pulling contests.

Community of Cardston. The town of Cardston was a key actor in Cardston's external environment. Therefore, I provide some detail on Cardston's history in the following paragraphs. Mormon immigrants from Utah first arrived in what is now Cardston on May 1, 1887, and encamped on Lee Creek (AEDT, 1989a). The town's namesake was Charles Ora Card (b. 1839, d. 1906), who led 10 families from Utah to the area, to avoid the United States' anti-polygamy laws (Pannekoek, 2002a). Card was a son-in-law of Brigham Young, one of the founders of the Jesus Christ of Latter Day Saints (Mormon) religion.

Card and his group settled a short distance from the Canada-U.S. border on Lee's Creek, a tributary of the St. Mary's River (Lehr, 1987). The region had a mild climate, and apparently arable soil. It was also close to the U.S. border, and Card almost certainly meant to move back to Utah in the future. By 1888, the Mormon Church had founded several cooperative businesses in Cardston, including a flourmill, cheese factory, store and sawmill. They also built the first irrigation system on the nearby St. Mary's River in 1898 (Pannekoek, 2002a). Construction began on the Mormon temple in 1913 (AEDT, 1989a). This massive granite building, which is still the centerpiece of the town, was the first Mormon temple outside the United States. In 1890, the Church suspended the practice of polygamy, and Mormon migration to Canada slowed significantly (Lehr, 1987). Members of the Mormon faith no longer had a compelling reason to leave the United States. Nevertheless, a number of Mormon communities, including Cardston, had developed in southern Alberta by this time and they continued to grow slowly.

Cardston's economy nearly collapsed during a drought and depression in the late 19th century (AEDT, 1989a). However, the Mormon Church successfully bid on a large irrigation project, based on the town founders' previous experience with irrigation projects. The Mormons were known for their knowledge of irrigation, after altering the Utah desert into arable land approximately 50 years previously (Rice, 1999). Also, shortly after settling in Cardston, the early Mormon settlers had built a number of small irrigation ditches.

In the late 19th century, the LDS Church entered into a mutually beneficial agreement with the Alberta Railway and Irrigation Company (AEDT, 1989a; Rice, 1999). Although the Mormons had expertise in irrigation, they did not have the capital to undertake large irrigation projects in the Cardston area (Lehr, 1987). However, the Alberta Railway and Coal Company had noticed the success of their early, small irrigation projects. In exchange for construction of an irrigation canal, Mormon workers would receive cash and land, valued at $3.00 per acre (Rice, 1999). The arrangement was mutually beneficial, in that the irrigation canal made the company's land more attractive for purchase by settlers, and the Church brought hundreds of settlers from Utah to construct the canal. Cardston's survival was ensured with the arrival of the railroad and the additional settlers (AEDT, 1989a). By 1920, 17 additional towns were founded in Southern Alberta, populated by members of the LDS Church (Rice, 1999).

At the time of my initial field research, Cardston's economic base included farming and ranching, as well as tourism for provincial historic sites, such as the Card log house (AEDT, 1989a; Pannekoek, 2002a). The town of Cardston believed that the horse-drawn carriage facility could help it become an important base of tourism in the province, and perhaps even the country (CDHS, 1978-1987). However, in reality, RACC's visitation was much lower than predicted, as discussed later in this chapter.

RACC as `The Deceiver' in initial field material. I saw Remington-Alberta Carriage Centre as a collective social actor called "The Deceiver." As shown in Tables 1.5 and 1.6, a deceiver is an actor that misleads others or disappoints their hopes. I believed this name accurately reflected my interpretation of the site's unique identity as an actor that had disappointed the hopes of the local community, as suggested by my initial field material.

The local residents were promised large numbers of visitors to the carriage centre, and therefore, significant economic spin-offs for local businesses. Unfortunately, the projected numbers of visitors never arrived, and the community's economic hopes were disappointed, as illustrated by two excerpts from my field notes.

> I asked [the Friends director] what she considered to be the main issue or issues, in the relationship between RACC and the local community. She stated that the community had basically been promised that the town would boom as a result of the site's construction. Local people supported the building of the museum, and want it to succeed. However, the projected visitors have not materialized, and local businesspeople are "a bit disappointed." (Field Notes, Friday, July 10, 1998).
>
> [A government employee] said that the townspeople were disappointed that promises that were made had not been fulfilled. . . . [The employee] attended organizational meetings with the community, before she was hired to work at the Centre. At those meetings, she says promises were made to the townspeople, that the Centre would attract 150,000 visitors each year. She believes this was a mistake. The townspeople believed the Centre was going to attract a great number of visitors, and the economic spin-off would be very significant for local business. But the expected number of visitors did not materialize [and] . . . after the first year, the visitation dropped dramatically. Within a year the initial enthusiasm of the town [for the Centre] dwindled. (Field Notes, Thursday, July 16, 1998).

Indeed, after the facility opened, it was unable to attract tourists to the Centre, even if they were already in the vicinity.

> "The department [i.e., division] is frustrated, because 1.6 million Glacier National Park visitors are only a few miles away. However, they have been unable to attract many to the carriage museum." (Field Notes, Wednesday, June 17, 1998).

Thus, the people of the Cardston region felt let down by the Centre, believing that the government was too optimistic with its early visitor estimates.

Summary

In this section, I provided historical information on each site, and a more detailed description of my interpretation of each site's identity, supported with details from my field material. The three sites differed substantially in type of collection, culture or region represented, and therefore, in their key community stakeholders. FSIC was located in the Crowsnest Pass, on a hill overlooking the famous Frank Slide. Although the Centre was named after that event, its programs and exhibits also interpreted the cultural history of the region. Thus, the site presented information about the region's coal mining history and the construction of the CPR line through the Pass. It also interpreted the local coal miners' activism, their historic association with socialist unions, and the subsequent election of a socialist town council during the 1930s. FSIC's key stakeholders included the people of the Crowsnest Pass, and other local cultural organizations, such as the Ecomuseum. I saw FSIC as a social actor that I called The Pretender. The Centre presumed to speak for the Crowsnest Pass region, but it represented a history that the community did not value nor wish to preserve.

HSIBJ was located next to the Piikani Reserve, near the Town of Fort Macleod. This historic site interpreted the traditional culture of the Plains First Nations peoples, with the participation of Piikani employees and Elders. Thus, some of the displays interpreted the rich archaeological record of the buffalo hunt, found at the adjacent buffalo jump. The site's key stakeholders included the Piikani Nation, and the nearby Town of Fort Macleod. I called HSIBJ The Trickster, because I saw it as an ambiguous organization. It acted as a culture hero for the Blackfoot people, but also commercialized and profited from that culture.

Finally, RACC was located in the town of Cardston, about 75 kilometres southwest of Lethbridge. In 1992, RACC was constructed to interpret a world-class collection of horse-drawn carriages, on land donated by the town of Cardston. Early estimates suggested that the Centre would eventually attract almost 300,000 visitors annually, providing significant economic benefits to Cardston and the surrounding region. Although those figures were later downgraded, the town still hoped to see significant spin-off financial benefits from visitors attracted to the facility. Thus, RACC's key stakeholder was the town of Cardston. I saw RACC as a social actor that I called The Deceiver, because it had disappointed the economic hopes of the community with unrealistic projections of future visitation figures.

Illustrating the Final Conceptual Framework

Earlier in this chapter, I outlined the final conceptual framework, which I developed from three themes found in the literature on organizational identity. In this section, I describe the approach that I used to illustrate that conceptual framework. It is important to note that I discuss methodological issues in a conceptual dissertation only to make clear how I developed my interpretation of the narratives, and why I believe my interpretation is appropriate and sound.

The section consists of four parts. First, I provide an overview of narrative inquiry. In particular, I describe how social actors construct an identity and understanding of their own experiences, as they tell stories or narratives about sequential events. Second, I describe the interview data from which I extracted narratives to illustrate the final conceptual framework. Third, I discuss the techniques that I used to interpret the data. Finally, I discuss the validity or validation of this secondary qualitative analysis.

Narratives and Identity Construction

Narrative inquiry is an inherently interdisciplinary approach, which builds on the recent interpretive turn in the social sciences (Riessman, 1993). Beginning in the 1980s, when the social sciences took on a more interpretive stance, narrative inquiry emphasized how people understood themselves and their own experiences (Bruner, 1986). In fact, Polkinghorne (1988) described narrative as a cognitive process through which people organize and make sense of their experiences. Specifically, he suggested that people create narrative meaning as they identify the events and actions that led to a certain conclusion, and then rework those events and actions into an episode or story. The stories and histories that emerge in narratives are the outward manifestation of this process of making meaning. Like sensemaking, narrative understanding is retrospective, since the importance of events is only apparent after outcomes or conclusions have occurred (Czarniawska, 1999).

By the early 1990s, several leading scholars had embraced narrative as the key organizing principle for conceptualizing human or social action (Riessman, 1993). For example, Polkinghorne (1995) argued that narrative is a type of discourse, in which people bring together events and human actions into a unified, goal-oriented process. Similarly, Czarniawska (1999) wrote that "the narrative mode of knowing consists in organizing one's experience around the intentionality of human action" (p. 14). That is, the scheme used to order experiences into a narrative or story assumes that human action is intentional (Czarniawska, 2004). The link between social action and narrative is important, because it suggests that social actors use narrative discourse to organize action and events into meaningful accounts. Thus, I could expect the facility managers to construct narratives around IO interactions, to create an understanding of the motives and actions of the site and other actors.

The story is the main object of study in narrative analysis (Riessman, 1993; 2002). Most narrative researchers define the story as a specific type of narrative, which orders events into a sequential, cohesive experience (Polkinghorne, 1995; Riessman, 2002). Indeed, Bruner (1990) argued that narrative is distinguished from other texts by its sequential nature. Each narrative includes "a unique sequence of events, mental states, happenings involving human beings as characters or actors" (Bruner, 1990, p. 43). Most narrative researchers also describe stories as interpretive representations of the storyteller's world, which allow them to understand human action, motives and events (Boyce, 1996; Polkinghorne, 1995; Riessman, 1993). This is similar to the sensemaking approach. In fact, Weick (1995) argued that sensemaking is actually the retrospective construction of a good story, one that is plausible, coherent, and useful in understanding future actions and events.

Within each story, plots organize experiences into a meaningful whole (Czarniawska, 1999; Polkinghorne, 1988, 1995). That is, the plot arranges action and events into a story by signifying the start and end of the story ("temporal range"), delimiting the relevant events, sequencing those events, and explaining their meaning (Polkinghorne, 1995). The elements of the story are only meaningful by their place in the overall configuration or plot (Bruner, 1990). Thus, narrative meaning or understanding occurs when we configure events into an explanatory plot (Czarniawska, 2004; Polkinghorne, 1995). This emplotment occurs as we note relationships among our perceptions of events and actions (Polkinghorne, 1988). We develop understanding or meaning through an iterative process, as we seek to develop a plot that will explain connections among the events and their apparent significance. Thus, the story's plot is important, because it provides the structure through which we understand the relationship among events in our experiences (Polkinghorne, 1995).

As an interpretive perspective, narrative inquiry privileges human action (Riessman, 1993). Thus, it is appropriate for research on *identity*, or the understanding of self. Indeed, Riessman argued that a person's series of interlinked stories can reveal temporal change in their identity. Similarly, Polkinghorne (1988) argued that individuals *construct* their identity through development of a narrative that allows them to understand their life as a single, continuous story. Research suggests that collective identity may also develop through storytelling. For example, Cain (1991) studied how members of Alcoholics Anonymous took on the collective identity of non-drinking alcoholics. During meetings, as they told stories about their addiction, they gradually transformed their individual identities as drinking non-alcoholics. During this process, they adapted their personal stories to closely resemble the typical AA story (e.g., heavier drinking, denying a problem, hitting the bottom, admitting inability to stop drinking, joining AA). Cain (1991) argued that the collective AA story, and the identity that it constructed for its members as non-drinking alcoholics, helped them develop a new understanding of their own identity and past experiences, as part of a collective identity. This study is important, because it suggests that individuals will adopt an organizational identity that is constructed and reflected through narrative. That is, we can understand the organization as part of an unfolding story about events and actions experienced by its constituent members.

Beginning in the 1990s, various organizational researchers (e.g., Boje, 1991) began to think about storytelling in organizations as the ongoing construction of meaning about organizational life, and the main way of knowing and communicating within organizations (Czarniawska, 1999). For example, Boje (1991) suggested that members of the organization continuously develop the organization's `story line', or overall narrative, as they incorporate interpretations of new observations. This is important, because in conjunction with the organizational identity literature, it suggests that the facility managers at my three field research sites continuously developed a story line about their own site, as they incorporated new interpretations about the site's recent IO interactions (Mishler, 1995).

Qualitative researchers often collect stories in interviews, and then analyze the transcriptions of those stories (Polkinghorne, 1995). Indeed, interviews provide the most common sources of stories in narrative research, since people will often respond to questions with a story, as they make sense of their experiences. Interviewees will choose to narrate certain experiences, often because they have experienced some dissonance around those experiences (Riessman, 1993). It is important to note, however, that narrative researchers acknowledge that meaning is constructed through interaction between the narrator and interviewers (Riessman, 1993). That is, they jointly make sense of the interviewee's experiences as she tells her stories.

Unlike other types of qualitative analysis, the narrative approach does not include any standard set of techniques for understanding how the storyteller has made sense of their experiences (Mishler, 1995; Riessman, 1993). However, Riessman (1993) argued that narrative research must include the following steps: identifying narrative segments, as opposed to simple descriptions; reducing stories to their core narrative; examining the structure and the selection of specific words; and studying how each story is related to previous ones.

All talk (or interview text) is not narrative (Riessman, 2002). Thus, the analyst must decide where a narrative segment begins and ends. Sometimes this is an easy decision, when the narrator gives clear signals that her story is beginning or ending. In any case, Labov's (e.g., Labov & Waletzky, 1967) structural framework is useful in identifying narrative segments, and extracting the core narrative from extraneous material. Labov's structural approach to narratives provides a framework for identifying that core narrative. Labov argued that complete or `fully formed' narratives have six key parts: *abstract* (summary of the narrative), *orientation* (description of the situation and relevant actors), *complicating action* (the sequenced events), *evaluation* (meaning of the action), *resolution* (outcome of the event or action), and *coda* (transition away from narrative, back to current activities).

The narrator's evaluation is important, because it constructs the narrator's interpretation of the story's meaning (Riessman, 1993). Indeed, Riessman (1993) refers to these evaluation statements as the "soul of the narrative" (p. 20). "In evaluation clauses, which typically permeate the narrative, a teller stands back from the unfolding action and tells how he or she has chosen to interpret it." (Riessman, 1993, p. 20). Thus, the complicating action provides only a basic description of facts (i.e., what happened), while the evaluation alters those facts into a fully formed narrative (Elliott, 2005). The evaluation clarifies the purpose of the narrative for listeners and analysts. To interpret that evaluation, Riessman (1993) suggested that the analyst should identify the resources (e.g., cultural) that the narrator draws on to persuade the listener.

In narrative research, meaning is accomplished through interactions among the narrator, analyst and reader of any written report (Riessman, 1993). Thus, researchers also construct meanings as they analyze the accounts of others (Mishler, 1995). Specifically, researchers construct both the story and its meaning through their worldview and methodological choices. For example, stories are typically intertwined with surrounding text in an interview transcript (Riessman, 1993; 2002). Often, the analyst's theoretical interests influence the identification of narrative segments. Thus, the researcher's interpretation becomes part of the story, as she makes choices on where the narrative begins and ends. The analyst also "infiltrates" the narrative text through "evolving understandings, disciplinary preferences, and research questions." (Riessman, 2002, p. 701). Following, I present my interpretations of empirical material, elaborating the value of an analysis based on identity and the specific identities that I have presented. The reader must then assess this according to the criteria of plausibility (e.g., Riessman, 1993).

Description of Interviews

In the remainder of the dissertation, interpretive narrative analysis was used to reanalyze data from previous studies conducted by the core research team, guided mainly by the work of authors such as Albert and Whetten (1985), Gioia (e.g., Gioia & Thomas, 1998, in Bouchikhi, et al.; Corley, et al., 2000), and Scott and Lane (2000). The most similar research within organization studies is the study by Dutton and Dukerich (1991).

To illustrate the conceptual model, I analyzed 16 interviews with government facility managers and other employees, conducted by core members of the research team between 1994 and 1999. Table 3.3 provides specific information on those interviews, including type of employee and number of interviews at each site. All interviews were between one and two hours in length. When the data was collected, the researchers used a qualitative approach (e.g., Oakes, Townley & Cooper, 1998; Townley, 2002; Townley, Cooper & Oakes, 2003). The interviews were conducted using open-ended questions in a conversational style (e.g., Patton, 1990). Occasionally, the researchers intervened with follow-up questions, to clarify points or explore an important event or issue.

In early interviews with the facility managers, the open-ended questions focused primarily on business planning and performance measures at the site. In later interviews, questions focused on changes at the site since the last visit, such as new revenue-generating programs or altered IO partnerships. In interviews with the other government employees, questions focused on both their responsibilities (e.g., planning special events) and recent activities at the site (e.g., adjusting to a new IO relationship with the Friends Society). Throughout the interviews, the researchers encouraged all participants to speak about related ideas and examples. Thus, all the interview transcripts, but especially those for the facility managers, provided rich narrative data for my analysis. All interviews were taped during the previous studies noted earlier, and were transcribed verbatim.

Data Analysis

I began my data analysis by re-formatting the word processing files for each interview. These format changes allowed me to import each file into *Atlas.ti* (Muhr, 1997), a software program for qualitative data analysis. Although I did not use *Atlas.ti* to analyze the interview narratives, I did use it to produce interview transcripts with numbered lines. As Riessman (1993) suggested, I found it useful to refer to these lines as I wrote my interpretation of the interview narratives.

I was most interested in the plot or content of each narrative, for two reasons. First, at a practical level, the interview transcripts did not include complete details on how the story was told, such as the length of pauses by the speakers. Second, and more substantively, my purpose was to illustrate the value of my proposed conceptual framework. Thus, I was most interested in the content of the stories about IO interactions, and the interpretations provided by the narrators.

I also chose to focus primarily on the facility managers' interviews, as those interviews included richer detail and interpretations about the site and its IORs. I believed this was appropriate because the organizational identity literature suggested that the vision and values of managers directly influenced the development of organizational identity, particularly in bureaucratic organizations such as government (e.g., Bouchikhi, et al., 1998; Scott & Lane, 2000). Nevertheless, I did incorporate narratives from interviews with other government workers whenever possible, to enrich my illustration of the conceptual model.

In the points that follow, I outline the procedure that I used to analyze the interview data at each site.

1. I reviewed each transcript, to refamiliarize myself with the content of each interview.
2. Following Riessman's (1993) advice, I used Labov's structural framework for narrative as the foundation for beginning my analysis. That is, using Labov's

framework, I identified the core narratives in each interview. At the same time, I eliminated the extraneous detail in the interview, such as a narrator's side comment to a staff member, an interviewer's clarification, or unrelated content. Full narratives had each of the parts outlined by Labov (e.g., abstract, complicating action). In contrast, narrative fragments or partial narratives included valuable narrative detail, including the narrator's explanation or interpretation of the IO interaction or the site's identity. However they did not include other parts of the narrative, such as the story's abstract. I printed each narrative or partial narrative to allow physical sorting during my interpretation. Typically, these full or partial narratives described one or more events involving other actors in the site's external environment. The stories ranged in length from a dozen lines to two or three pages of text.

3. I read through each narrative or narrative fragment and sorted them into groups according to their main content. Those groups included narratives that illustrated the construction of the site's identity, and the site's IORs with each of four different types of social actors (i.e., the division, the visitor, the community, the Friends Society).

4. Then, I analyzed the content of each narrative or narrative fragment, using different coloured markers to identify the lines related to the site's identity, IO interactions, and the narrator's interpretation of those IO interactions. I was particularly interested in the narrator's *interpretations*, both of the site's identity and the interests that external actors had in the site. As I began to group together the related narratives, my interpretation revealed more details about the narrative construction of the site's organizational identity. It also uncovered interpretations that suggested the use of elements reflective of content-based IO theory (e.g., references to political power) and the interests or needs of the site or external actors.

5. Based on this analysis, I developed a deeper interpretation of the stories told by the participants in their interviews. That is, I developed **my own narrative** about how the storytellers constructed meaning about the site and enacted its IORs. My narrative described how the stories about IORs illustrated the conceptual framework on identity construction through IORs, and included direct quotes from exemplar narratives.

My interpretations focused on the links among organizational identity and IO interactions within meaning making narratives. It also focused on how organizational identity either facilitated or hindered the successful development of IORs.

6. I also looked for any patterns among my deeper interpretations. Specifically, longitudinal changes among the stories at each site suggested that construction of organizational identity was an ongoing process. Similarly, differences among the stories told at each site suggested that organizational identity did influence enactment of the external environment.

Validation of the Illustrative Data Analysis

Validity, or validation, is an "unresolved dilemma" and a "thorny" issue in narrative research (Riessman, 1993, pp. 21 & 64). As I have emphasized above, the narrative approach assumes that `facts' are constructed through the narrative process, Thus, the storyteller's point of view – their interests and values – will influence the way the story is told. Similarly, a different interaction among participants and the interviewers could have led to construction of different interview narratives, while the analyst's interpretation is influenced by her own values and intent.

Since narrative analysis is an interpretive approach, we cannot use validity procedures that are based on realist assumptions. Instead, in narrative research, validation is "the process through which we make claims for the trustworthiness of our interpretations" (Riessman, 1993, p. 65). Indeed, Riessman has argued that, given the interpretive basis of the narrative approach, we must accept the truth of the researcher's interpretation. That is, if we accept that storytellers construct meaning through their stories, we must also accept that the researcher constructs meaning as she develops her own narrative about those stories.

Riessman (1993) identified several approaches to validation of narrative analyses.[2] Three of those approaches seemed most relevant to my research. She suggested that *persuasiveness* and *coherence* were the most relevant validation criteria for comparative case studies, while the *pragmatic use* criterion was most relevant for development of general theory from narratives. In my view, my analysis meets these three criteria. First, I would argue that my interpretation is *persuasive*, or "reasonable and convincing" (Riessman, 1993, p. 65). My interpretation shows persuasiveness by providing empirical evidence from the narratives told by participants at the three sites, to justify my theoretical assertions about the conceptual framework. More importantly, it shows persuasiveness through affirmations by several readers. For example, Barbara Townley, a member of the research team read and agreed with my interpretation of the narratives at the three sites. Similarly, an outside reader, familiar with the Crowsnest Pass and FSIC, read my interpretation of the narratives at FSIC and concurred with my story about that site. This individual was also familiar with HSIBJ and the culture of the Blackfoot Nation, and agreed with my interpretation of HSIBJ's identity as The Trickster.

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[2] These criteria for assessing the validity of qualitative analysis are similar to those suggested by other authors (e.g., Lincoln & Guba, 1985).

Second, I believe that my interpretation is *coherent*, specifically in its repetition of themes. Riessman (1993) writes that the analyst's interpretation shows themal coherence in its discussion of content. "Chunks of interview text about particular themes figure importantly and prominently." (p. 67). In the following chapters, my interpretation of the narratives at each site is organized around various themes. This occurs especially in the first section, as I draw on interview data to persuade the reader about my understanding of each site's identity. Those themes around identity then emerged again and again, as I interpreted narratives about each site's IO interactions.

Third, I would argue that my interpretation will become *pragmatically useful* in the future. Riessman (1993) states that narrative interpretation is pragmatically useful if it provides the foundation for the future work of other researchers. Although I cannot yet argue that my work has done that, I believe it will do so in the future. As Riessman suggests, I have provided sufficient detail to allow other researchers to build on my work. Thus, I have described the procedure that I used to develop my interpretation, and have made some primary data available to the reader, through frequent inclusion of direct quotes in the three following chapters. However, confidentiality agreements would prevent me from making entire transcripts available to the reader.

I must also address the validity of my decision to use pre-existing interview data to illustrate the conceptual framework. Secondary analysis of qualitative data is the re-analysis of artefactual or non-naturalistic data, such as interviews and field notes, which other researchers collected and shaped in some way (Heaton, 2004). In the past, we did not recognize the potential for analyzing and publishing research based on pre-existing qualitative data. However, over the past decade growing numbers of researchers are exploring the potential of secondary qualitative data analysis, particularly in the fields of healthcare, education and criminology.

We can attribute the increasing re-use of qualitative data to its various benefits (e.g., Corti & Thompson, 2004; Hammersley, 1997; Heaton, 2004; Thorne, 1994, 1998). For example, my reworking of the primary research team's interview data meant that the participants at my three empirical sites did not need to set aside time for additional interviews. Similarly, access to a high-quality set of longitudinal interviews at my three field research sites meant that I did not need to expend the resources to collect additional data (Heaton, 2004). In addition, my secondary analysis allowed a more focused analysis of a smaller subset of the primary researchers' interview data (Thorne, 1994). That is, my secondary analysis used a subset of interviews to examine questions about the IORs of Alberta's cultural sites, which had arisen during the original analysis of the entire set of interview data.

Nevertheless, it is important to note that various authors have identified some issues or concerns about the secondary analysis of qualitative data (e.g., Corti & Thompson, 2004; Heaton, 2004; Hinds, Vogel & Clarke-Steffen, 1997; Thorne, 1994, 1998). Two of these issues are most relevant for my research. First, secondary analysis may lead to important ethical issues (Corti & Thompson, 2004; Hinds, et al., 1997; Thorne, 1994, 1998). For example, ethical concerns may preclude the original researchers from providing secondary analysts with confidential details about interview participants. As a result, secondary analysts may experience difficulties or distortions in their analysis because they do not know key contextual details. Alternatively, secondary researchers may inadvertently include harmful detail about individual participants in their subsequent research outputs. However, I believe that my participation in team research meetings, my initial field research at the three sites, and my familiarity with that part of Alberta provided the necessary context for secondary analysis of the senior researchers' interviews. Indeed, according to Glaser (1963), secondary analysis often occurs in team research, when individuals interpret data that they did not personally collect. As a junior member of the research team, my dissertation research was also bound by the senior researchers' ethics approval from the University of Alberta. Thus, in the following chapters of my dissertation, I illustrate my own story about identity construction of the three cultural sites with quotes that will not harm the reputations or careers of the individual participants.

Second, some methodologists argue that qualitative data collected for one research study may not `fit' the perspective and research questions of another study (e.g., Corti, 2000; Corti & Thompson, 2004; Hinds, et al., 1997; Thorne, 1994, 1998). Thus, structured interviews with a different conceptual focus will hinder secondary analysis grounded in an alternative conceptual focus. However, as stated earlier, I illustrate my conceptual framework through secondary analysis of interviews conducted in previous studies that were interested in identifying how and why social and institutional forces had shaped practices in the Historic Sites and Services division, such as the imposed business planning requirement (e.g., Guba & Lincoln, 1994). I include my interpretation of the secondary data only to illustrate the proposed conceptual framework. Thus, I am not claiming that my conceptual framework is generalizable, based on my secondary analysis of qualitative data. Also, as I described earlier, the data was collected through open-ended interviews. This methodology led to rich detail on topics that were of specific interest to the primary researchers. However, most of the interviews also included rich narratives about each site's IO interactions.

Summary

In this final section, I described how I used narrative analysis to illustrate the conceptual framework. Narrative inquiry is an interpretive approach that emphasizes how people understand themselves and their own experiences. In fact, we can view narrative as a cognitive process through which social actors develop meaning as they identify and organize events and actions into meaningful accounts or stories. I suggested that the facility managers at my three empirical sites would construct narratives around their site's IO interactions. In those narratives, the site's identity and the narrator's use of concepts that reflected key elements of IO theory would shape the storyteller's interpretation of other actors' motives for interacting with the site. Those interpretations would either reconstruct or contest the site's identity, and therefore would influence the success of that IO interaction. Thus, we would expect the narratives told by a facility manager, supplemented by those of other employees, to contribute to an overall narrative that constructed the site's identity in relation to other actors. Then, I described how I analyzed the narratives in the pre-existing interviews with participants at each site to develop my own interpretation. I concluded the section with a discussion of the validation of my analysis.

Chapter Summary

After returning to the literature on organizational identity and IORs, I developed a second conceptual framework that acknowledged the central role of organizational identity in IO interactions. An interpretive, narrative-based approach allowed me to illustrate the framework through my interpretations of employees' narratives about each cultural site's IO interactions. In the following chapters, I present my interpretation of how each site, or more specifically its members, constructed its identity through narrative interpretation of its IO interactions. I begin with my account of the construction of the Frank Slide Interpretive Centre's identity as The Pretender.

Chapter Five

The Pretender

> *pretender / n.* 1) a person who claims a throne or title etc. 2) a person who pretends.
> *pretend to / v. intr.* a) lay claim to (a right or title etc.) 2) profess to have (a quality etc.).
> *pretend to / v. tr.* aspire or presume; venture. (Barber, 1998, p. 1146).

In Chapter One, I described my initial fieldwork at the three cultural organizations, and my subsequent view that the sites were collective social actors with distinct organizational identities. Chapters Two and Three described the continuation of my research journey, as I explored the literature on interorganizational relations. In Chapter Four, I presented my final conceptual framework. Then, I argued that the managers and other employees continuously constructed the site's identity organizational identity, as they developed narratives to understand the actors in its external environment, and the site's interactions with those actors. Finally, I described the narrative methodology used to interpret the interview data as an illustration of this process. In the next three chapters, I build on that material.

In this fifth chapter, I present my understanding of the narrative material in the five interviews done with the manager and other employees at the Frank Slide Interpretive Centre (FSIC). The chapter is organized with two main sections: narrative construction of the site's identity; and identity and interactions with other actors in the site's interorganizational environment. My interpretation of the narratives is illustrated with representative quotations from the interviews at the FSIC.

Narrative Construction of Identity: The Pretender

As described in Chapter Four, after reviewing the initial field material, I began to see the FSIC as a social actor, with a distinct organizational identity. I understood the centre as 'The Pretender', a collective social actor that both aspired and presumed to speak for the people of the Crowsnest Pass region. I argued that this organizational identity was constructed – and often contested – through the site's ongoing interactions with other actors in its external environment. That is, through interactions with other actors, the managers at the FSIC both constructed and then asserted the Centre's right and responsibility to represent the interests of the Crowsnest Pass region. However, the other actors did not always accept that role for the site.

In this section, I summarize my interpretation of the managers' narrative construction of this organizational identity as The Pretender. The section is organized around three main topics. The first two topics, the name of the site, and community support for the site, support my initial understanding of the site's identity. The third topic describes recent challenges to the site's identity.

The Name of the Centre

Originally, Alberta Community Development planned to give the FSIC another name – The Historical Crowsnest Pass Orientation Centre. As part of a province-wide system of museums and interpretive centres, the division had designed this centre to present programs and exhibits on the varied history of the local region. However, the division chose to place the building at the top of a hill overlooking the remnants of the massive rockslide, probably because the main highway was nearby. Then, before the building was finished, the local Member of the Legislative Assembly persuaded the division to change its name to the Frank Slide Interpretive Centre, believing that it would attract more visitors to the site. Unfortunately, the building's new name and the location erroneously suggested to visitors that the centre was dedicated to information on the famous Frank Slide of 1903. Indeed, visitors were often surprised that only a few exhibits specifically focused on the Frank Slide. "[S]ince this place has opened there have been comments from the visitors that we don't do enough about the Frank Slide itself. The programs are too general, about the Crowsnest Pass." (Interview with Employee, 1999, Lines 603 to 605).[1]

Nevertheless, the facility manager did not mention the anomalous name of the Centre in an interview until 1999. In a lengthy narrative, the manager described the problems associated with the centre's name. "That is the biggest complaint [from visitors], `You don't have much on the Frank Slide'." (Interview with Manager, 1999, Lines 2053 to 2054). She continued to develop the narrative, describing the new regional manager's recent proposal that they change the name back to that originally planned by the division. She said that he strongly believed the site's name should reflect its real purpose – to represent the history of the Crowsnest Pass region. According to the regional manager, a name change would lead to fewer complaints from visitors, and would also focus their attention back on the `real' history of the region.

> He is very upset about this because he believes passionately that the Frank Slide is a cheapened tawdry story and the real story is the history of the Crowsnest Pass, and this Centre was put here to interpret that history. So -- `The Frank Slide, how did it ever get to be more than a minor story?'. . . . Frank Slide was never envisioned to be what the Centre was all about. It just happened to be built here [near the Frank Slide], that is all. (Interview with Manager, 1999, Lines 2036 to 2045).

Despite the regional manager's presentations to both the FSIC's staff and its Advisory Board, however, he was unsuccessful in persuading either group to rename the Centre.

My interpretation of this narrative suggests that the manager constructed the FSIC as The Pretender, a collective social actor that professed to understand the historical importance of the Frank Slide. First, she seemed to believe that the regional manager was wrong, that the Frank Slide was an important part of the `real' story of the region. Second, her narrative also constructed the site as the actor that understood how to use the Frank Slide to engage the interest of passers-by on the highway. Changing the name of the Centre would not solve the problem, since the building itself overlooked the detritus of the slide.

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[1] During my initial fieldwork, I had also noted my surprise that the centre had only a few exhibits

> [The regional manager] says the problem is the name, that is what people expect, but they are going to expect it anyway. . . . [He] does [not] understand . . . that if you put it here, people are going to drive through [on the highway] and see it and the first thing they are going to ask when they get here is what happened. And we have to answer that before we go on. (Interview with Manager, 1999, Lines 2054 to 2055; 2067 to 2070).

Although the centre's name might mislead visitors, it did encourage them to stop there, because they wanted to learn more about the slide. Once they had stopped, however, they often stayed and heard more about the general history of the Crowsnest Pass.

In a related issue, my interpretation of the narratives also suggests that the managers constructed the FSIC as the social actor that presumed to understand the importance of the region's natural history. In two separate narratives, the facility managers described how they fought for the right to develop appropriate exhibits and programs. The managers used these narratives to show how they were forced to actively oppose the Historic Sites and Services division, if the site was to represent an authentic history of the Crowsnest Pass.

First, in 1995 the manager developed a narrative about the division's inappropriate focus on the socio-cultural history of the region, while ignoring the importance of its local geological features and wildlife. To illustrate his interpretation, he told a story about his attempt to develop a nature-oriented display for the interpretive centre. A local hunter had shot two bears and a cougar, and the manager had obtained the mounted specimens for exhibit at the FSIC. After receiving approval for the project from his regional manager, he began to finalize plans for the exhibit, acquiring a large piece of Douglas fir root for its base.

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devoted to the Frank Slide.

However, as the log was being sandblasted in the parking lot, he was told that he could not set-up the wildlife exhibit in the interpretive centre. [2]

In my view, the narrative shows how the manager constructed the site as the entity that ventured to represent a more authentic history of the region. According to the manager, hunting was also an important part of the region's past, which the site should represent with a natural history exhibit. However, the division wanted the centre to focus exclusively on the cultural history of the region. The manager believed that this focus inappropriately neglected other important features of the region, which would be attractive to visitors from outside the region.

> [The division] doesn't want to have anything to do with things that are scientific, or [the] natural side of life, and perceives that I have a terrible bias in that area, even though [it] is something that the public feels too. Our chief complaint that we have received since it opened is that here is a geological feature that people study about in school and know all about, or at least know of, [that] has been turned into a small regional cultural attraction that nobody is interested in except for local people. (Interview with Manager, 1995, Lines 362 to 369).

Second, a narrative in the 1999 interview with the FSIC's second manager also emphasized the importance of science programs at the FSIC. In this narrative, the manager constructed the identity of the site in opposition to the division. That is, she constructed the site as a collective social actor that professed a better understanding of how to interpret the region's rich history. In her narrative, she argued that they could not adequately educate the public about the cultural history of the region, without discussing relevant scientific topics.

> And unfortunately we have to talk about science . . . . And our department doesn't like science. `Oh, science.' So it is really a struggle for them. You can't talk about Turtle Mountain without getting into geology and you can't talk about coal mining without talking about geology. And they just start to

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[2] In 1997, at the time of my initial fieldwork, this Douglas fir root still sat unused in a corner of the FSIC manager's office.

> shudder when they hear it. But that is a big part of our program. (Interview with Manager, 1999, Lines 2072 to 2079).

The same year, an employee of the FSIC also commented on the importance of the site's science-oriented programs. The FSIC staff had consciously decided to add more science programs, even though those topics were largely omitted from the division's official planning document, which outlined the site's major interpretation themes and objectives.

> For example, we have wandered, not wandered, we have very purposefully gone into science programs. That does not tie in very closely with the [themes listed in the] interpretative matrix. We do tie it in sort of tangentially, I guess. There is a section in the matrix that talks about coal formation for the Crowsnest Pass. Okay, that leads us to geology and we are going to talk about geology. (Interview with Employee, 1999, Lines 225 to 236).

My interpretation of these narratives suggests that the manager and other employees constructed the site as a collective actor that professed to understand the importance of science – or nature – to the Crowsnest Pass region. Although the division built the site to interpret cultural history, the managers at the site asserted their belief that the FSIC should represent the broader history of the region. According to the FSIC's managers, natural history was an equally important part of that region's history. As the actor that professed to represent the region, the site had developed an ongoing narrative about the public's desire to learn more about these natural or scientific topics.

Community Support for The Pretender

My analysis of the interview narratives suggested that the people of the Crowsnest Pass did not entirely accept the site's claim to speak on behalf of the region.

> [W]e found that we were having a hard time drawing community people up to the Centre . . . . We are not really drawing a large crowd from the local community so we spread out our events now [over the year] to try and draw

> in people from Calgary and Lethbridge and [the province of] British Columbia. We advertise them a lot more to a broader range to draw people in from other communities. (Interview with Employee, 1997, Lines 936 to 937; Lines 944 to 949).

Many people in the Crowsnest Pass also did not value or accept some parts of their region's history, particularly those aspects related to coal mining and the labour movement. As many of the site's exhibits and programs represented those roots, the staff frequently heard comments that denigrated or denied that part of the community's heritage.

> I know [we] have done in the past . . . programs about strikes and unions and development of communism in the Pass. And some people have been angry that we dare talk about [that]. `That did not go on here and you are exaggerating it, it didn't occur. My family does not live in a place that supports communism.' (Interview with Employee, 1999, Lines 418 to 423).

Finally, my interpretation of the narratives also suggested that the people of the Crowsnest Pass often did not appreciate the historical significance of the older buildings in the region. For example, in a 1999 narrative the manager was making sense about performance measurement in a cultural organization. In her view, the site's main role was to educate the local community, to create awareness about the importance of historical preservation.

She suggested that this was not an easy process, because many local residents did not value old buildings and other historical landmarks.

> And not everybody thinks old buildings matter. They don't, especially around here. `It is just a larch house, why do you want to save it?' We just do. But they don't understand that the [larch?] house is as important as the mine manager's house, as a miner's cottage, as an outhouse, as – and that these are all stories of the past that speak more eloquently than any words. (Interview with Manager, 1999, Lines 1513 to 1518).

Ongoing vandalism of the region's historic buildings also suggested that the community valued neither the historical buildings, nor the site's aspiration to preserve them. In one narrative, the manager described the community's vandalism at the old Greenhill mine in the Crowsnest Pass.

> When I was [a] kid all the machinery and everything was in there and the men's pay books and the lamps and generators . . . . I don't think they valued [them], just because they could . . . . I think it is just because they know they are not supposed to. If you board something up they feel they have to smash in to get at it, then they get in there and [they] are just a bunch of old mine lamps so they smash them because they don't really want them or take them and throw them away later. It is very frustrating. (Interview with Manager, 1996, Lines 759 to 780).

In brief, my analysis shows how the site professed to speak on behalf of the region. That is, I believe the managers' narratives constructed the site as an actor that represented the community of the Crowsnest Pass, including its historical background in mining and communism. However, the managers believed that many people in the local community did not value that past. As a collective actor, the community did not value the site's goals of preservation and education about their historical background. The FSIC ventured to speak for the region, but the people of the region did not accept that self-proclaimed meaning for the site.

Recent Challenges to The Pretender's Identity

In the mid-1990s, the FSIC had to cope with two externally imposed challenges to its identity. First, the division broadened the mandate of the site. Since 1986, the FSIC had offered interpretation of the historical Crowsnest Pass at both the FSIC and nearby, at Leitch Collieries. However, in February 1996, the division expanded their mandate, adding responsibilities not assigned to any other historic site. The FSIC was now also responsible for helping to preserve historical structures throughout southwestern Alberta, and even to develop new historic sites in that region. In her narrative, the manager presented this as a positive change for the site, one that may have signalled to the community that it was important to preserve historical buildings.

> I don't know if it is coincidence or what, but it seems as soon as this new position came about with the new responsibilities, suddenly building owners from all over popped up and wondered how to get grants and everything. And no one has ever asked in all these years, when it wasn't our responsibility. All these people now are saying `Oh, I have a historic building. What can I do?' (Interview with Manager, 1996, Lines 797 to 803).

However, the community's sudden interest in grant funding led to an increased workload for the site, and in particular for the facility manager. Increasingly, the manager spent more and more time away from the FSIC; this reduced the attention she could give to maintaining program quality at the site. [3] That is, I believe that the site's expanded mandate challenged its identity as the actor that represented the region through high-quality interpretive programs.

Second, as part of province-wide government cutbacks and restructuring, the division required that all historic sites develop their own business plans. They expected those plans to include specific objectives for various functional areas, such as marketing, more typically associated with private sector organizations. Initially, the manager showed some ambivalence about what was seen as a partial privatization of the site. In general, she associated business planning with the development of future plans, which could help them to achieve their own goals in representing the region.

> [Business-planning] made us think about some issues that we had never considered before. We had always been non-business, just philosophically opposed to profit and very much government in that sense. And [business planning] made us think of running our operation as a business . . . . How do we plan for the future? (Interview with Manager, 1996, Lines 980 to 987).

However, the manager was also concerned about the potential negative impact on the FSIC's two main purposes – to interpret and preserve the local history. The site valued the division's requirement to develop future plans, including cost-recovery interpretive programs that could provide the financial resources to update their ten-year old exhibits. Still, the manager was concerned that the division might lose sight of the FSIC's real reason for existence – to preserve the rich heritage of the region.

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[3] For example, during my initial fieldwork, I visited a potential historic building with the facility manager and the education officer. We took some photographs of the building to send to the Calgary office, and then made a side trip to visit the ruins of the Hillcrest Mine disaster.

> The interpretation brings in the money, but – ah – the preservation side protects our heritage . . . . I'm a little worried that if times get really tough again any programs that don't bring in money, at least cost recovery, may not get the support they deserve. (Interview with Manager, Lines 1521 to 1527).

By 1999, the site's initial ambivalence about the division's restructuring activities had changed into more negative views on the privatization of government – they now had to focus on increasing their revenues. To accomplish this goal, they implemented additional fees for special interpretive programs and cancelled their less `efficient' programs.

For the first time, the centre charged a fee for school programs, to help them meet their new financial targets. However, my interpretation of the narratives suggests that these fees challenged the site's identity as the actor that interpreted local history for any interested citizens, regardless of their ability to pay. "It was very hard for us as education officers to start charging for school programs. And we have become a hybrid now, we are not totally private enterprise but we are a lot further towards that than we ever were." (Interview with Manager, 1999, Lines 1545 to 1548). The manager of the site was philosophically opposed to fees, which she believed could limit the citizen's access to information about their own history.

To cope with budget cutbacks and government restructuring, the site also cancelled some interpretive programs, such as guided trail hikes through part of the Slide, or to an old mining town in the Crowsnest Pass. To meet their new performance targets, the centre could no longer spare an interpretive officer to deliver lengthy programs to small groups of visitors.

> You start being more aware of cost effectiveness, that if you do a guided [trail] walk for six people that takes an hour and you have a limited number of staff; you are better off doing a 20-minute boardwalk talk with 60 people. You use your resources more effectively. The downside of it is that those six

people who went on the trail walk loved it and thought it was great and got maybe more out of it. (Interview with Manager, 1999, Lines 1554 to 1559).

With fewer programs and less time to train a smaller workforce, the manager believed that the FSIC's program quality was deteriorating. My interpretation suggests that she viewed this as a serious challenge to the site's identity; she was no longer satisfied with their efforts to provide an authentic, historically accurate experience for visitors. "[W]e are doing the best we can with what we've got. But I would like to slow down and put quality over quantity again." (Interview with Manager, 1999, Lines 1606 to 1608).

In conclusion, my interpretation of these narratives shows that the site had recently experienced external challenges to its identity. As The Pretender, the site was the actor that ventured to represent the region. It accomplished this through high-quality interpretive programs and preservation of the rich local history. However, the manager believed that the FSIC's broadened mandate, along with recent government cutbacks and restructuring, diminished the site's ability to represent the region.

Summary

To summarize, as described in Chapter Four, organizational identity construction served as the main theoretical basis for the dissertation. Based on my interpretation of the narratives in the FSIC interviews, I identified three themes that supported my view of the site as a social actor, with a distinct collective identity that was represented by the name `The Pretender'. First, my analysis found that the site's official name – the Frank Slide Interpretive Centre – did not accurately reflect its emphasis on the region's cultural history. That is, the reference in the Centre's name to a specific event did not suggest the actual content of its exhibits and many of its programs. Also, as the self-proclaimed representative for the Crowsnest Pass, the managers presented the site as an advocate for the region. They argued that visitors would not understand the region's important cultural history, without also learning about its natural history.

Second, my interpretation of the narratives also suggested that the site professed to speak for the region, despite the ambivalence, and even resistance of the local community. The FSIC existed to protect their heritage, one that many did not value nor wish to preserve. The division also resisted the Centre's presumed right to speak on behalf of the community. According to the division, the FSIC existed to preserve the cultural heritage of the region. However, the Centre did not accept that role for itself; instead its managers aspired to reach out to a broader public, by presenting a more complete interpretation of the region's history.

Finally, my interpretation revealed the challenges that the dynamic environment created for the organizational identity of the FSIC. In particular, the manager believed that their program quality had declined due to budget cutbacks, while accessibility was reduced through an emphasis on cost recovery programs. As a result, they were no longer able to effectively speak for the Crowsnest Pass. In the next section, I build on this interpretation, describing the link between this contested identity for the site, and how the manager worked to establish and maintain successful interorganizational relations with these other actors (i.e., IORs that would allow the site to achieve its own interests or goals).

Organizational Identity and Interorganizational Relations

As described in Chapter Four, my literature review suggested that the site's identity influenced the managers' interpretation of the Centre's interorganizational environment. That is, the meaning that the site held became the context in which the managers interpreted the key interests or goals of the other actors in the external environment. That interpretation then served either to reconstruct or to contest the site's identity as the actor that presumed to speak for the Crowsnest Pass. I suggested that the site would not form or maintain successful IORs with actors that contested its identity. Some actors believed that the site legitimately spoke for the whole region. Others contested this identity and thus saw the site as The Pretender. I also argued that the managers' interpretation of the other actors' interests would reflect key aspects of content theories about IORs.

My review of the Actor-Network Theory (ANT) literature also contributed substantially to the conceptual development of the dissertation. In particular, the sociology of translation (e.g., Callon 1986a, 1986b) provided a frame for understanding how the Centre formed and maintained its interorganizational relations with other actors. According to the sociology of translation, we would expect the manager to use her interpretation of the other actors' interests, to try to incorporate them into an IOR. That is, the manager would try to convince other actors that they would achieve their own goals by helping the site to preserve the heritage of the Crowsnest Pass. As presented below, my interpretation suggested that these attempts were often unsuccessful, especially when the other actor held conflicting interpretations about the FSIC's reason for existence.

In this section, I substantiate these arguments with illustrations from my interpretation of the narratives in the FSIC interviews. The section is organized according to four broad categories of actors, as represented in the managers' narratives: the division, the community, the visitor, and the Friends of the Frank Slide. The section begins with a key actor, the HSS division itself.

The Division

In the 1995 interview with the FSIC's founding manager, seven of the eight narratives referred explicitly to the division, or managerial representatives of the division. This suggests to me that the manager saw the division as a key actor in the site's external environment. My interpretation of the narratives suggests that the manager believed the division's motives conflicted with those of the Centre, and therefore impeded its ability to achieve its purpose. In this section, I present my interpretation of three narratives to illustrate how the site's identity and the manager's use of arguments resonant with interorganizational theories led to this interpretation of the division's interests. The first narrative is described in considerable detail, to illustrate the details of my argument. The second and third narratives are presented in brief form, to corroborate the first example.

In the first narrative, the manager described how staffing decisions were made in 1985, when the site first opened to the public. The division received over 300 applications for the permanent and seasonal positions at the site. However, the manager was told that he had to receive approval from the minister and the local MLA, before he could make any employment offers. Unfortunately, he did not receive that approval until the same day that employment was to begin. In the end, the division approved his choices for the permanent positions, but told him whom to hire for the seasonal positions. He was frustrated by the delay, but especially the direct involvement of the division in site-level staffing decisions. To deliver excellent interpretive programs to the public, he believed he needed the autonomy and lead-time to hire and train the best applicants.

> [W]e are put out here to try to put together the very best program we can for the public and then we are told who we are going to have to do that when we don't . . . I mean it is fine if you interview those people and they are the best for the job. But, when I opened up here I literally had a box of applications. More than three hundred. Literally a box of seasonal applications for positions here. And they wouldn't let me hire. (Interview with Manager, 1995, Lines 256 to 261)
>
> Well I had people hanging on the line for months . . . saying `I am sure that I have a job but unfortunately I can't offer it. Please hang in there.' I think it was April 24th of the year that we opened that – April 25th was the first day of employment. It was the 25th I think that I got a call from somebody telling me that it is OK to hire these people . . . . Now the way that came down, if I hadn't had those people sitting there I would have just been screwed. And that was five days before our opening to train staff, to have them ready to be out there. (Interview with Manager, Lines 263 to 273).

In this narrative, the manager contrasted the motives of the site with those of the division. That is, he constructed the site as an impartial actor that spoke for all people of the region, while he questioned whether the division was motivated by political considerations. "I was told, oh, really without any, oh, the rationale behind it that we would suddenly have to hire somebody because so and so is some politician's daughter. Or a certain landowner's son." (Interview with Manager, 1995, Lines 253 to 255).

In this narrative, the manager appeared to draw upon a version of resource dependence theory (RDT) to develop his understanding of the division's interests. As described in Chapter Two, RDT suggests that actors are motivated by the need to reduce environmental uncertainty (Pfeffer & Salancik, 1978). They accomplish this by developing strategic alliances with other actors that will help them to ensure steady resource flows. My interpretation suggest that the manager believed the division hoped to strength its alliance with the legislative branch of the provincial government, by including the local MLA in hiring decisions for seasonal positions. Thus, over time, the division would expect that relationship to result in steady or increased resources for the division.

In my view, the manager's second narrative enacted a similar interaction between the site and the division. The Frank Slide Interpretive Centre was known for a slideshow called *In the Mountain's Shadow*, which consisted of scenic photographs of the area accompanied by a soundtrack describing the historical highlights of the region. The manager chose to preview the show to local tourism contacts, prior to the Centre's grand opening. They ". . . were going to a conference to represent this particular area and that was going to be just before our grand opening. And I thought that it was in the best interest of our promotions to do just that." (Interview with Manager, 1995, Lines 211 to 214). However, a division-level manager reprimanded him, saying that he had gone against the wishes of the local MLA, who wanted the public to be the first official audience for the show.

My interpretation of this narrative suggests that the manager constructed the FSIC as the best judge of the audience that should first see the slideshow. The site's goal was to preserve and interpret the local history to as many visitors as possible. Previewing the slideshow to its tourism contacts would help it to achieve that purpose. From this viewpoint, the manager enacted the division as a politically motivated actor, wanting to maintain good relations with the legislative branch of the provincial government. By granting the MLA's request, the division would strengthen the dependence relationship between itself and the actor that provided much of its income. In the long-term, that stronger relationship would reduce environmental uncertainty for the division.

The third narrative described a more recent interaction between FSIC and the division. In 1993 – 1994 the division implemented a business-planning requirement at the site-level. It asked each site to develop a business plan, including ideas for local profit-generating initiatives. In conversations with the FSIC manager, a division-level manager encouraged him to focus on delivering fee-based school programs. In response, the manager developed a list of other ideas he wished to explore, such as providing interpretation programs in a bus, and coordinating helicopter tours of the region. The division discarded all but one of his ideas, focusing on the one that he thought was least likely to succeed.

My interpretation of this narrative suggests that the manager continued to enact the site as the actor that spoke for the region, and therefore the best actor to decide on profit-generating initiatives for the site in that region. The manager enacted the division as a more conservative actor that preferred to focus on traditional money-making initiatives, such as interpretation programs for local school divisions. The manager's interpretation of the division's motives reflects key topics in institutional theory. According to institutional theory, organizations act to maintain the perceived legitimacy of their structures and practices (Meyer & Rowan, 1977). The division believed the manager's less traditional ideas for profit-generating programs, such as helicopter tours, would reduce that perceived legitimacy. Therefore, it wanted the site to focus on school programs, which were commonly offered by museums and interpretive centres.

Manager's construction of success in incorporating the division. My interpretation of these narratives suggests that the FSIC managers were unable to successfully incorporate the division into their interpretation of the site's identity. As the actor that presumed to speak for the Crowsnest Pass, the managers at FSIC did not accept the interests that they believed the division held for the region. That is, the managers believed that the division was more interested in building political alliances with influential people in the community, than representing the natural history of the Crowsnest Pass. These values differed significantly from those of the front-line government employees at the FSIC. They valued inclusion in the Centre's exhibits and hiring practices, and creativity in their profit-making initiatives, to ensure their survival as the actor that presumed to speak for the region. This is important, because the division was a powerful actor in the Centre's external environment. A strong relationship with the division would have helped the site to stabilize its network of IORs. Instead, my interpretation of the narratives suggests that the manager expected the division to continuously de-stabilize the site's IO network, by trying to prevent its attempts to form IORs other actors. For example, at the end of a narrative about the series of articles with the local newspaper (see the section on the community below), the manager said that he expected to be reprimanded by division-level managers for undertaking the project. "I sent [the regional manager] a copy of it. And I said that the profits are going to the Friends Society for the exhibits. And, ah, I kind of expected to hear something." (Interview with Manager, 1995, Lines 554 to 556).

The Visitor

All the interviews with the manager and the two other government workers included frequent references to visitors or tourists, suggesting to me that these individuals continuously enacted visitors as an important part of the Centre's external environment. My interpretation of the managers' narratives indicates that they believed the visitors' interests directly complemented those of the FSIC. Indeed, the interests that the managers imputed to the visitors helped to construct the site's identity as the actor that presumed to represent the Crowsnest Pass region. In this section, I illustrate this interpretation further with a discussion of several narratives or partial narratives, selected from the three interviews with FSIC's managers.

As described earlier in this chapter, my interpretation of several narratives in the 1995 interview with the manager suggested that he enacted the visitor as an entity that wanted to experience a variety of high-quality, interesting programs and exhibits. My interpretation also suggests that the manager believed the site was the best judge on how to accurately represent the region to its visitors. The manager believed that, given the autonomy to develop those programs (e.g., helicopter tours) and exhibits (e.g., a wildlife display), visitors would respond positively. To construct this understanding of the visitor, the manager appeared to incorporate arguments reflecting key topics in stakeholder theory. According to stakeholder theory (e.g., Freeman, 1983, 1984; Mitchell, Agle & Wood, 1997), the visitor was a legitimate stakeholder for the site. I am suggesting that the manager believed the division neglected the legitimate interests of the visitor, choosing to privilege the interests of more powerful, less `legitimate' stakeholders, as described earlier.

The FSIC's second manager also enacted the visitor as an actor that wanted-ongoing access to excellent programs and services. She conveyed this interpretation in a partial narrative about the potential impact of budget cutbacks on program quality at the site. "We've got a very good reputation now; if we do one bad program and that word of mouth gets around then we're screwed." (Interview with Manager, 1996, Lines 1385 to 1387).

A complete narrative serves as an exemplar of the FSIC's attempt to meet the visitor's needs, while maintaining an authentic experience for the visitor. Recently, the Centre had built a small kiosk in the parking lot, to provide a basic food service for visitors during the peak tourist season. However, vandals had destroyed the food kiosk, and the staff had decided to replace it with an historic cart.

> So this year . . . we got an historic cart that we have never used – it has been in the display areas. We pulled that out right by the front entrance and put an umbrella over it and sell hot dogs and hamburgers, chips and things from there and that seems to work quite well. It is colourful and historic looking. And people seem to like that. (Interview with Manager, 1996, Lines 577 to 582).

In this narrative, the manager constructed the visitor as an actor that desired an `authentic' historic experience at the site. At the same time, she constructed the site as an actor with complementary interests. That is, according to this narrative, the FSIC's staff understood how to provide access to historic sights, even while meeting the visitor's practical need for food and refreshments. To develop this interpretation, the manager seemed to incorporate arguments reflecting key aspects of stakeholder theory. That is, she identified a key interest of a legitimate and powerful stakeholder group, the visitor, and then altered the site's facilities to accommodate those interests.

Manager's construction of success in incorporating the visitor. The visitor was a key actor, one that the FSIC wished to incorporate into an ongoing relationship. As described above, my interpretation suggests that the managers at FSIC believed that most visitors wanted to participate in the site's high-quality programs, and see their exhibits on the historic Crowsnest Pass. By successfully translating visitors into its actor-network, the site would fulfill its main goals – to preserve and interpret the history of the Crowsnest Pass region to a wider audience. However, my analysis suggests that the managers constructed mixed success in the site's attempts to incorporate visitors into an IO relationship.

In one respect, the manager believed that the site's name allowed it to successfully incorporate more visitors. As described earlier in this chapter, the division had originally planned a different name for the site, one that would have more accurately represented the centre's programs and displays. However, when the regional manager proposed that they change the centre's name, the staff and advisory board spoke against his suggestion. In her narrative, the FSIC manager described the regional manager's disappointment with this decision.

> He doesn't realize that you must have a hook to draw people in, [such as a reference to the Frank Slide in the site's name], and once they are in you can tell them about the history of the coal mine and Crowsnest Pass and they will love it. . . . And when you are in a client-focussed business you have to have what you think they would like, not what you think they should know. And then you get them into what you think they should know gradually. (Interview with Manager, 1999, Lines 2001 to 2012).

In this narrative, the manager argued that the site's misleading name allowed it to attract more visitors. The name of the centre attracted the visitors, and then the staff directed them toward the cultural exhibits and programs. In this sense, the identity of the site as The Pretender contributed to successful incorporation of many visitors.

However, the FSIC managers also believed that two key problems had limited their success in attracting many visitors to the site. First, in an early interview with the FSIC's first manager, he suggested that the division had not allowed him to implement the exhibits and programs needed for increased visitation. For example, in the 1995 narrative described earlier, the manager had described his disappointment over the division's decision to veto his planned natural history exhibit. He believed that the display would have attracted more visitors to the site, while helping the site to preserve an important part of the local history.

Second, my interpretation also suggested that the managers believed certain limitations of the facility decreased their ability to incorporate visitors. The FSIC was one of the older interpretive centres in the province. Although the division acknowledged that they needed new exhibits throughout the Centre, they had not set aside any funds for that purpose. The staff believed that they would attract more visitors if the division would provide the necessary recapitalization funds to update the displays.

> There hasn't been a great deal of change with the Centre itself. The display area – we are progressing really slowly in updating our displays and the Centre itself
>
> . . . . Our displays are over 10 years [old], and . . . because we get a lot of repeat visitors we do need to update our display. (Interview with Employee, 1997, Lines 1562 to 1568).

Similarly, the staff noted that fewer bus tour groups included stops at the FSIC in their itinerary. The staff believed that bus tours, especially those aimed at senior citizens, chose not to stop at the FSIC because the site did not have a cafeteria.

> We used to get a lot more bus tours than we are getting now. I don't know if that was because we started charging [an admission fee], which might have

> made a difference. But now we are finding that particularly because we don't have a cafeteria, with senior tours that is hard, they will pass us by. And they will go to Head-Smashed-In or [Remington-Alberta Carriage Centre at] Cardston because they have cafeterias . . . . And I find that is the biggest reason -- because they can't come up here and sit down and have a coffee, and for seniors that is a big deal. (Interview with Employee, 1997, Lines 352 to 362).

To summarize, the managers' narratives constructed FSIC as only partially successful in incorporating visitors into its IO network. My interpretation of the narratives suggested that the managers believed FSIC's name allowed it to attract more visitors than it would otherwise. However, the managers also said that recapitalization of the site's exhibits and renovations to include a cafeteria would allow it to incorporate additional visitors into its IO network. Although the managers believed that visitors were interested in the exhibits and programs provided by the Centre, they also thought that the Centre was not able to fulfill other related interests or needs. This is important, because decreasing numbers of visitors also challenged the site's identity as The Pretender. The site aspired to speak for the region, but could best accomplish that if it could successfully incorporate more visitors into its IO network.

The Community

Earlier in this chapter, I outlined my understanding about how the lack of community support contributed to establishment of the site's identity as The Pretender. In general, the people of the Crowsnest Pass region did not value nor accept the asserted role of the FSIC. However, some community members and other organizations did wish to form IORs with the FSIC, as illustrated by my interpretation of two narratives told by the managers.

In the first narrative, we gain considerable insight into the site's interactions with a private sector organization. In 1995, the FSIC's first manager described a recent project that he had undertaken with the local newspaper, *The Crowsnest Pass*

Promoter. The editor had approached him, asking him to collaborate in a series of articles about the region. He agreed to participate in the project, with two stipulations.

> I will write some articles for you and I will give you some colour pictures. I will get as involved as I can to make something out of this. I will be asking for two things . . . . I don't want anything personally out of this, and I will donate anything that you think that I provided on this to the Friends Society for exhibits. That is all I want to have happen out of that. I would like a free ad for the Centre . . . . We got a half page for the division on the back page which I set up for here [the Frank Slide Interpretive Centre] too. (Interview with Manager, 1995, Lines 540 to 549).

The manager believed that the editor approached him, and by association the site, because she wanted to increase the prominence and quality of the project. "[She] contacted me about this paper a year ago, she was all ready to go with it and she wanted us at that time to try to make it a bigger, better thing without squelching the whole thing." (Interview with Manager, Lines 535 to 538). His interpretation of the newspaper's interests also continued to construct the site's identity. In this narrative, the manager constructed the site as an important source of information about and photographic representations of the region. It is my view that the manager believed he was approached because the site spoke for the region.

The newspaper editor wanted to develop an excellent project that accurately portrayed the region, and therefore requested the FSIC manager's assistance. However, the manager was concerned that other actors would misinterpret the site's formation of an IOR with a private organization. To maintain the site's legitimacy as an organization that stood for all citizens, the manager stipulated that any compensation would go to the Friends Society, the non-profit organization that was formed to support and promote the site.

In 1999, the FSIC's second manager told a narrative about an IOR that the centre had formed, along with the Friends, with two local historical organizations. They had developed a "loose organization" called the Crowsnest Heritage Partners.

Since these organizations had the common mandate of historical preservation, they believed they should coordinate some of their activities. In the narrative, the manager described how they received permission to raise a small billboard advertising the FSIC and the other two organizations. Against the protests of some community members, the town council agreed to allow them to place the billboard on a high school fence next to the highway. "[We] were able to demonstrate the economic spin-offs from our sites, and what a worthwhile community partner we were to the municipality and that we should be allowed to be an exception and have our billboard up. And they agreed." (Interview with Manager, 1999, Lines 462 to 466).

My interpretation of this narrative suggests that the manager constructed these historical organizations as actors with similar interests to those of the FSIC. That is, she believed this alliance would allow the Centre to attract more visitors, enhancing its opportunities to speak for the region. Also, the alliance should lead to future opportunities to advance their efforts for historical preservation in the Crowsnest Pass. Therefore, her interpretation of the other sites' interest in the FSIC may have also served to re-construct the site's identity as the keeper of the area's history.

The manager believed that the other organizations wanted to form an alliance with the FSIC to enhance their perceived legitimacy as historic organizations. In her narrative, she also appeared to incorporate topics reflecting the key arguments in stakeholder theory to explain the interests of the town council in this "loose organization." That is, she believed that the town council had an economic interest in the success of these historic sites.

Manager's construction of success in incorporating the community. My interpretation suggests that the managers believed the Centre was partially successful in its attempts to incorporate the community into IORs. They believed that the community-at-large continued to be non-supportive of the FSIC. For example, in 1999 a consultant surveyed the community, and determined that they were not prepared to support a fundraising campaign for recapitalization of the site's exhibits.

However, the managers did develop narratives about successful IORs with some community-based organizations. My interpretation of these narratives suggests that the site's identity provides an explanation. For example, the manager knew that the local newspaper wanted to publish an accurate, appealing series of articles about the region. In exchange for his involvement, that manager arranged for a free half-page advertisement for the division and Centre, strategically located on the back page. The newspaper was convinced that, to achieve its goal, it needed to work with the site, the best source of regional information and photographs. In the manager's words, "And I wrote five or six of the seven or eight articles. And I gave them the pictures and worked closely with her as to just what is supposed to be there." (Interview with Manager, 1995, Lines 549 to 551). In this case, the narrative suggests to me that the site's identity facilitated its formation of an interorganizational partnership with the local newspaper.

My interpretation suggests that the manager at FSIC also constructed the other historical organizations as important actors that it should incorporate into the Centre's IO network. As described earlier, the manager believed that the organizations and the FSIC shared common interests. By incorporating these actors into its IO network, the site enhanced its ability to represent the unique history of the Crowsnest Pass region. That is, I am suggesting that this IOR also reaffirmed the site's identity as spokesperson for the region. "So that is good to see, that there is strength in numbers and when you unite with partners of common interest you can do more." (Interview with Manager, 1999, Lines 468 to 470)

In brief, my interpretation of these narratives suggests that interactions with the larger community in the Crowsnest Pass revolved around the site's identity as The Pretender. The people of the region contested the site's authority to speak for the region, and did not share the site's interests. However, the manager's narratives also constructed positive interactions between the site and some specific actors (e.g., the newspaper) within the community. Those actors had complementary interests to those of the site, because they also wished to represent certain aspects of the local community (e.g., local news). Therefore, these actors accepted the site's self-professed role as The Pretender, the key actor that spoke for the region. By incorporating these actors into its IO network, the FSIC continued to construct its self-image as the actor that legitimately represented the region.

The Friends of the Frank Slide Interpretive Centre

In recent years, my interpretation suggests that the FSIC manager had enacted an altered IO relationship with the Friends of the Frank Slide Interpretive Centre (Friends). In 1995, none of the FSIC manager's interviews focused specifically on the Friends. Apparently, that manager did not see the Friends as an important actor in the site's external environment; most of his narratives focused on the division, as described earlier. However, in 1996, the new manager included the Friends in three partial narratives, and constructed an ambivalent depiction of the Friends. She saw the Friends as an actor that provided helpful second opinions on her plans for the Centre. However, she also constructed them as `petty' in some of their funding-related decisions for the site. The 1999 interview included 10 narratives or partial narratives about the Friends. My interpretation of these narratives suggested that the manager now believed the interests of the site directly conflicted with those of the Friends. In this section, I present my interpretation of three narratives from that interview, about control over admission fees and the FSIC's programs or exhibits

The division did not implement admission fees to Alberta's historic sites until 1991. Until that time, a key role of the Friends society at the FSIC was to collect donations at the door. The Friends used these funds to help pay for special projects at the Centre. After the division instituted admission fees, however, those funds were forwarded to the main office for inclusion in the regular budget. As a result, the Friends Society at the FSIC had lost one of their main sources of revenue.

Several years later, the province slashed its budget to reduce its debt. The division was concerned that the provincial Treasury department would take control of the admission revenues from its system of historic sites. In July 1997, to ensure that this would not happen, the division entered into annual cooperating agreements with the Friends society for each site. These one-year, renewable agreements stipulated that Friends societies would collect the admission fees at their site. They would then use the funds to provide key services at that site, primarily the interpretive programs. In 1998, the FSIC's cooperating agreement with the Friends also stipulated that the Friends would set aside 15 per cent of their gift shop revenues into a recapitalization fund. The FSIC's exhibits were aging, and the manager and the Friends agreed that new exhibits and perhaps some renovations would become a financial priority at that site.

The division viewed these cooperating agreements as "money-laundering" arrangements with sympathetic, non-profit organizations at the community-level. However, in effect, the Friends society had now become the official employer of the non-permanent interpretive staff at each site. Significantly, through their control of the admission fees, they also held the `purse-strings' for many program-related decisions at each site.

In the first narrative, the FSIC's manager described escalating tensions between the Centre and the Friends over control of the admission fees. Originally, the purpose of each nonprofit Friends society ". . . was to enhance the programs and services offered from the Frank Slide Interpretive Centre." (Interview with Manager, 1999, Lines 529 to 530). However, the Friends had also become more involved recently in operational decisions at the FSIC. The manager believed this had occurred because the cooperating agreement gave the Friends control over the site's admission fees.

> At first Chinook [Country Tourist Association] was sought as the contractor to take the admission fees. Then the Friends put forward an argument [they] would do it for nothing because they care for the sites and it would be easier. Fine, so it looked good and we went along with that. But the problem with it is that `he who plays the piper calls the tunes'. We have really seen that decisions that are made for spending the admission fees are supposed to be made by the government, the Friends are just keeping that money. But in actual fact the Friends feel, even though they may deny it, there is a feeling

> that that is their money . . . . But in their attitude they have changed from being supportive and being helpful to being, how would you describe it? Somewhat judgmental and certainly very protective of that money that has been raised. (Interview with Manager, Lines 585 to 605).

In this narrative, the manager juxtaposed the motives of the site against those of the Friends. The site wanted to provide high-quality exhibits and programs. To ensure that necessary revenues would remain available to the site, they had entered into a contractual agreement with the Friends. They had believed that the Friends, their long-term community partner, would do what was best for the site. However, instead, control of the admission fees had changed the Friends' interests. In this narrative, the manager constructed the Friends as a selfish actor, one that was judgemental and non-supportive of the site.

As described earlier, RDT (Pfeffer & Salancik, 1978) suggests that organizations develop IORs to reduce uncertainty in their external environment. Organizations accomplish this by ensuring their ongoing access to resources. Through its IOR with the FSIC, the Friends Society ensured its access to financial resources. As described in Chapter Two, Emerson's (1962) concept of power-dependence suggests that an actor gains power when other actors are dependent on it. In this narrative, the manager said the Friends were making many decisions for the FSIC, because "he who plays the piper calls the tunes". Thus, the manager used a key assumption seen in RDT to construct the Friends as an IO actor that wanted to control the site through its financial resources.

In contrast, she constructed the site through its ongoing interactions with the Friends. After developing an interpretation of the Friends as a judgemental and power-hungry actor, she reasserts the site's claim to speak for the community through responsible decision-making and financial management.

> The difficulty here is that [the Friends] are not accountable. They operate the facility. If something goes wrong it is the government that answers, not the Friends . . . . And ever since the Friends were formed the government staff have actually done much of the Friends' work and given the Friends the

> credit because they are community partners and we want to make sure they do well. Now all that money that they have raised is in the name of the Frank Slide Centre and technically all that money belongs to the government of Alberta which owns the facility. (Interview with Manager, 1999, Lines 596 to 608).

In the second narrative, the manager enacted a similar IO interaction between the FSIC and the Friends. Since the Friends had begun to collect and administer the site's admission fees, they had become increasingly involved in making decisions about the FSIC's programs. In this narrative, the manager describes how the Friends overruled some of the government staff's plans for a special event.

> We are dependent on the Friends very much for advertising, staffing and we have run into a situation where staff here will plan a special event – And the Friends – last year we had the 95th anniversary of the Frank Slide and in a meeting the Friends literally decided what we would do. They took the plans staff had, and said `Well we like this, we don't like this' and determined down to the program level what would happen. (Interview with Manager, 1999, Lines 637 to 644).

The manager narrated her objections to this degree of involvement by the Friends in program decisions.

> The problem I have with that is that as a professional in the field I feel I have expertise and so do the other staff in running this centre and doing the programming and certainly input is wonderful and advice and such. But when the final decision comes I am accountable, [the marketing director] is accountable, the education officer] is accountable, as government employees to what happens here. (Interview with Manager, 1999, Lines 646 to 651).

My interpretation of this narrative suggests that the FSIC's identity provided the perspective through which the manager interpreted the motives of the Friends. That is, the manager constructed herself as the guardian of the site and as the best actor to decide on responsible programs for the community. The site's goal was to be accountable to the citizens of the province and more specifically, the region. The manager enacted the Friends as an actor that improperly wished to speak for the community, vetoing some of the FSIC's plans to commemorate the 95th anniversary of the Frank Slide. The FSIC was the legitimate actor to speak for the region. The FSIC's employees were experienced professionals and government employees, accountable to the citizens of the Crowsnest Pass.

The third narrative about the Friends involved an ongoing conflict about a well-known slideshow exhibit. The FSIC had successfully argued to the division that they needed to redo the slideshow, *In the Mountain's Shadow*. They had been using the same 35 mm slides since the centre opened, and the slides needed to be redone. "It was embarrassing. We had so many complaints from the public. The slides were burnt out. They were practically white." (Interview with Manager, 1999, Lines 705 to 706).

Based on a quote of $25 to $30K, the FSIC and the division decided to proceed with the project. However, they soon realized that the project would actually cost closer to $50K, and that they had a shorter timeframe than anticipated. The only contractor with the necessary technology was available immediately. After that, he was busy with other projects for several months.

> So we were in desperate straits and made the decision to go ahead with this contractor to catch him with this window. And damn the cost, we were going to do it and we were going to pay for it however. Well, it turned out there wasn't enough government money. There was some but we decided we could swing it with some money from Head-Smashed-In and some money from admissions. And we had signed a contract [with the Friends] the year before that; 15 per cent of the gift shop gross will be put into the fund for re-capitalization [of the FSIC's exhibits]. We felt we had that [money] as well. In our minds this was re-capitalization. It could be a new show, it just happened it was this. (Interview with Manager, 1999, Lines 708 to 717).

The Friends did not agree with the FSIC's decision to redo the *Mountain's Shadow* slideshow. They believed they had not been properly consulted; that repairs to this existing exhibit should be paid out of government funds; and that the FSIC should have chosen a less expensive format, such as a PowerPoint presentation. At the time of the interview, in July 1999, the Friends had refused to provide any money from the recapitalization fund. As a result, the contractor had not yet been paid in full.

The manager was unhappy, saying that the Friends were using inappropriate tactics. "It is a power struggle. In a sense the Friends are holding the government for ransom. They are saying, `We have this money. We are not going to give you this money unless you respect us.' " (Interview with Manager, 1999, Lines 779 to 782). She also questioned the Friend's authority to recommend different technical alternatives.

> I think it is not quite appropriate when the Friends are vetoing decisions that are made by our technical people in Edmonton, who are saying this [i.e., 35 mm slides] is the only way you can do the show . . . . We know from investigating other technical options, and we think that is really important as the professionals of visitor services at the site. The Friends is a board of very intelligent people but they are not that familiar with Historic Sites specifically, or any sites, or audiovisuals, or any of these more technical aspects. (Interview with Manager, Lines 798 to 812).

My interpretation of this narrative suggests that the manager enacted the FSIC as the actor that presumed to speak for the region. To accomplish this, the FSIC needed to use its expertise to develop the best exhibits and displays about the Crowsnest Pass. At the same time, she constructed the Friends as an illegitimate actor, one that did not have the expertise to make these decisions.

The manager believed that the Friends did not have the professional expertise needed to participate in decision-making for the FSIC. If the FSIC gave into the Friends' demand for increased involvement in operational decisions, the manager believed the Centre would harm its perceived legitimacy as the historic site that represented the Crowsnest Pass community.

Manager's construction of success in incorporating the Friends society. In this section, I presented my analysis to illustrate how the FSIC managers constructed an unsuccessful interorganizational relationship with the Friends. The site presumed to speak for the region. This organizational identity precluded the site from forming an entirely successful IO relationship with the Friends. My interpretation suggests that the FSIC's manager constructed the Friends as an actor that also aspired to represent the region. According to the manager, the Friends wanted a more powerful role in the daily operations at the FSIC. "[W]hen you have a community [group] raising money they feel they want a say in how it is spent. They don't just want to raise it and hand it over to someone, which is understandable." (Interview with Manager, 1999, Lines 608 to 611).

However, the manager believed the technical expertise and professional knowledge of the site's staff was necessary to properly represent the region's history and culture. Therefore, the manager believed the Friends were making illegitimate claims; the manager believed that the Friends also wanted to speak for the region, through greater involvement in operating the FSIC. The manager's construction of an unsuccessful IOR with the Friends is important, because they might have been a key actor in the FSIC's IO network.

> I think it is useful to have a community group in [the Friends'] role, because the government doesn't tend to listen to its own staff in these matters. You need an advocate group to say, `Well, shouldn't the Frank Slide Centre have this?' and `Is it fair that they don't have that?' I think it is a good role in many ways. (Interview with Manager, 1999, Lines 617 to 622).

However, until the Friends accepted a limited role as an advocate, the FSIC could not successful incorporate them into their IO network.

> And somewhere down the line they have to accept they are not partners. We call them partners because it is a nice word. But when we have all the accountability for the government, then we have to have the decision-making authority. And they can be a voice but they can't be making the final decision, because they don't have the accountability. So I don't know what we call them because they can't be true partners and they can't be truly independent. (Interview with Manager, Lines 943 to 949).

In summary, the FSIC was not able to maintain a successful IOR with the Friends. My interpretation suggests that the manager constructed the Friends as an illegitimate actor, motivated by the desire to control the FSIC and its programs. The FSIC believed that it should represent the region, by planning appropriate programs and exhibits. Therefore, it could not accept the Friends' recent actions. It wanted the Friends to act as an advocate for the site, in its efforts to influence its relationship with the division.

Summary

In Chapter Four, I suggested that the site's identity affected the success of its interorganizational relations. Specifically, the site's identity was the context within which the manager interpreted the interests and motives of external actors. My interpretation of the managers' narratives in the FSIC interviews supported that argument. The site was not able to form and maintain stable relationships with the community-at-large, the division, nor the Friends. None of these actors accepted the site's assertion that it should speak for the region. That is, they contested the site's identity. The community-at-large had no interest in forming an IOR with the site; it did not value the history that the site worked to preserve. My interpretation suggested that the managers constructed the division as an actor that wanted to control the site, so that it could use its resources for its own purposes. As a result, the division prevented the site from entering into some IORs. The managers believed the Friends had illegitimate aspirations to represent the region themselves.

The FSIC was partially successful in developing a relationship with the visitors to the site. My interpretation of the manager's narratives suggested that this occurred because they constructed the visitor's motives as complementary to those of the site. The visitors were attracted to the site by its name, and wanted access to the site's high-quality exhibits and programs. That is, the visitors did not contest the FSIC's identity as a spokesperson for the region. However, the visitors' interests in the site were changing. They now wanted the site to have new exhibits, a cafeteria, and additional school programs. As a result, visitors were gradually disengaging from a relationship with the site.

Finally, the FSIC was able to form and maintain stable IORs with some local organizations, with interests that complemented those of the site. My interpretation suggests that the managers constructed these organizations as actors that wanted to form IORs with the Centre to enhance their own legitimacy. They would accomplish this through access to the site's expertise in historical interpretation and preservation. Therefore, the managers believed these community organizations accepted the site's assertion to represent the region. The FSIC was able to form stable IORs with these organizations because they accepted the site's identity.

Chapter Summary

This chapter draws on my interpretation of the manager's narratives to describe how the FSIC's identity as The Pretender influenced its IORs. Through interactions with the division and visitors, the site developed its organizational identity as the actor that ventured to speak for the Crowsnest Pass region. The chapter also described recent challenges to the site's identity as The Pretender, primarily due to provincial government cutbacks and restructuring. Then, the chapter illustrated my argument that the FSIC's identity as The Pretender affected its ability to form and maintain stable IORs. My interpretation of the manager's narratives showed that the site was unable to form stable IORs with actors that contested its identity. They saw it as The Pretender, and thus contested the legitimacy of its claims. The next chapter proceeds with a detailed discussion of Head-Smashed-In Buffalo Jump.

Chapter Six

The Trickster

> "A mischievous supernatural being much given to capricious acts of sly deception, . . . often functioning as a culture hero, or one that symbolizes the ideal of the people." (Merriam-Webster, 1995, p. 1130).
>
> *trickster / n.* 1) a person who enjoys playing pranks and practical jokes on others; a joker
> 2) a person who deceives others for esp. financial or political gain; a fraud or cheat

In this sixth chapter, I present my interpretation of the narrative material in the six interviews completed at Head-Smashed-In Buffalo Jump (HSIBJ). Again, I organize the chapter around two main sections: narrative construction of the site's identity, and the role of identity in interactions with other actors in the site's interorganizational environment. Representative quotations from the interviews at HSIBJ are used to illustrate my key assertions.

Narrative Construction of Identity: The Trickster

After I reviewed the initial field material, I began to see HSIBJ as a collective social actor with a unique organizational identity. Specifically, I saw HSIBJ as a collective actor called `The Trickster', a capricious culture hero for the Blackfoot Confederacy of southern Alberta. I believed that the site constructed this identity – and possibly contested it – through its interorganizational interactions. That is, through their narratives about interactions with external actors, the managers at HSIBJ constructed and asserted the site's responsibility to preserve and represent the culture of the Blackfoot people. However, as The Trickster, the site also showed ambiguity of purpose, as the manager constructed narratives bout seeking financial gain from the centre's cultural exhibits and programs.

Thus, the name `The Trickster' reflects the ambiguity in the Blackfoot's feelings of pride about the site, and their concern that the site is using their culture for financial gain. It also reflects the manager's ambiguous position, since he is charged with preserving the Blackfoot culture, yet must also profit from that culture to sustain the facility's operations. Finally, the name chosen to represent HSIBJ's ambiguous identity also reflects the ambiguity found in the legend about the buffalo jump's name. According to that legend, a young Blackfoot man, eager to view the results of the successful hunt, hid beneath the buffalo jump. Unfortunately, the buffalo hunt was so successful that his skull was crushed by the numerous buffalo carcasses that piled around him.

In this section, I summarize my interpretation of the manager's narrative construction of the site's organizational identity as The Trickster. The section is organized around two main topics: culture hero for the Blackfoot Nation, and ambiguity about commercialization of the site's cultural role. Both these topics support my initial perspective on the site's identity.

Culture Hero for the Blackfoot People

The interpretive centre at Head-Smashed-In Buffalo Jump was built in 1987, to preserve and interpret the traditional culture of Southern Alberta's Blackfoot peoples. Therefore, it was not surprising to find clear references to the site's role as a champion of the Blackfoot culture in the early interviews at HSIBJ. In this sub-section, I describe three narratives or partial narratives, to illustrate my interpretation of how the site constructed its identity as the preserver of traditional Blackfoot practices, values and beliefs.

First, a partial narrative in 1994 included three references to the site's mission or role in preserving the Blackfoot culture. The context was a discussion of the manager's recent business planning activities. As part of those activities, employees were expected to develop the first formal mission statement for the site. However, the manager argued that the site's mission was already clear to everyone in the division and the surrounding communities. "I think everyone knows what [the site's mission] is. Basically, it is to preserve the site, which is a [UNESCO] World Heritage Site, as well as, uh, interpret that site . . ." (Interview with Manager, 1994, Lines 345 to 349). The world-renowned centre had received the UNESCO designation, to signify its role in preserving and interpreting the cultural heritage of the Blackfoot people.

The manager went on to claim that HSIBJ was unique within the provincial system of cultural sites. "You see, this is a Native site too. And they claim moral ownership over it. And that has to be respected. Legal ownership is the government's, but moral ownership is definitely Blackfoot." (Interview with Manager, 1994, Lines 384 to 386). As a result of this unique partnership with the site's moral co-owners, the manager argued that it was particularly important that the centre's programs and exhibits reflected the Blackfoot's traditional values and attitudes.

> "As long as you are respectful to the mandates of the facility, that you're not pandering. That you're not, you know, selling religious ceremonies or something to all the wannabe non-Natives in the world. As long as you don't do those crass things, which is in the business plan, too: How to represent the site." (Interview with Manager, Lines 445 to 449).

In this partial narrative, it is my interpretation that the manager constructed HSIBJ as The Trickster. That is, he constructed the site as a collective social actor that worked to preserve the ideals of the Blackfoot culture. The manager acknowledged that the government shared ownership of the site with the Blackfoot. Although the government legally owned the site, the manager recognized that they were obligated to include the Blackfoot as another type of `owner'. The site existed to preserve and interpret not only the physical artifacts, but also the accompanying traditional values of the culture. Therefore, he argued that HSIBJ did not develop any programs that would desecrate the spiritual side of the site, nor specific Blackfoot rituals.

Second, in another partial narrative, a First Nations employee at the site described her views on the site's importance in preserving and interpreting First Nations culture. The employee began this partial narrative by describing her initial dislike of the centre. "To tell you the truth . . . when I [first] came up here I didn't like this place . . .. Because it destroys the um, the sacredness of the whole, I guess."

(Interview with Employee, 1996, Lines 741 to 755). As described in Chapter One, the centre was built at the site of an ancient buffalo jump. However, a small hill adjacent to the buffalo jump was a sacred place where the Blackfoot held Vision Quests. These were religious experiences, typically undertaken by young Blackfoot men. These individuals fasted and then retreated alone to the hill for several days. They stayed there until they experienced a vision, which would provide them with spiritual guidance. Given the centre's proximity to this Vision Quest site, as well as to an old burial ground, this First Nations employee had initial misgivings about not only the site's location, but also its existence. However, she eventually accepted a position at HSIBJ. It was located close to her home on the Piikani (Peigan) reserve and allowed her to use her educational qualifications.

As time passed, she became convinced that the site actually served an important purpose, helping all First Nations peoples to develop pride in their cultural heritage. She told about a First Nations visitor from Manitoba who had told her he originally "didn't want to go to another one of those damned Indian places!" (Interview with Employee, 1996, Lines 816 to 817). However, after visiting the site, he was impressed by its authentic portrayal of a traditional First Nations lifestyle. "I'd say this [the centre] is really good because it's – it teaches Native people [who visit the site] a pride that they can identify as a people . . . ." (Interview with Employee, Lines 776 to 777]. Incidentally, she also believed the site was important for non-Natives, with its authentic representation of First Nations culture. ". . . [T]hat's what they [non-Natives] like about this place, is that it doesn't have stereotypes." (Interview with Employee, Lines 788 to 789].

In this partial narrative, it is my view that the First Nations employee constructed HSIBJ as a culture hero for the Blackfoot people, as well as other First Nations peoples. That is, she constructed the site as a collective actor that presented the Blackfoot culture authentically, avoiding stereotypes of First Nations traditions and beliefs. She also constructed the site as an actor that helped Blackfoot and other First Nations peoples to develop pride in their traditional culture.

Finally, in a 1997 narrative, the facility manager spoke about the site's role in preserving Blackfoot beliefs about their culture's origins. The European-Canadian manager described how a Blackfoot employee had corrected him after he spoke to the public at the site.

> I said `Ten thousand years ago no one was here and then the Blackfoot came and then the whites and started changes in the land.' Anyway, a Native staff [member] said afterwards, `That is not true. We have always been here and we always will. Since the time began, since the Great Spirit landed us here, we have always been here'. (Interview with Manager, 1997, Lines 2654 to 2658).

The Blackfoot believed that they were the first and thus rightful inhabitants of Southern Alberta. Therefore, the employee had corrected what he or she saw as an obviously inaccurate statement by the manager. The manager's beliefs about the archaeological evidence did not supplant the cultural beliefs of the Blackfoot employees at the site. In turn, those cultural beliefs affected the underlying assumptions for all programs and displays at the site. "It is assumed . . . that they [the Blackfoot] have always been here and we will never touch that publicly." (Interview with Manager, Lines 2674 to 2675).

My interpretation of this final narrative suggests that the manager constructed the site as an actor that provided cultural guidance for the people, and represented the people's cultural origins. As The Trickster, the site's public programs and displays had to concur with the Blackfoot views on their origins as a people. Alternative viewpoints, if they disagreed with the Blackfoot people's traditional assumptions, were not acceptable at the site.

In brief, the interpretation I present in this section describes how the site represented and preserved the cultural ideals of the Blackfoot people. HSIBJ was constructed by the manager and other employees as a collective actor that preserved and interpreted the culture of the Blackfoot with integrity. It provided a non-stereotypical view of the culture, and was a source of pride for the Blackfoot and other First Nations peoples.

Commercialization of the Blackfoot Culture

My interpretation of several narratives or partial narratives suggests that HSIBJ's manager, and perhaps other employees, were eager to generate additional revenues at the site. The site's operational budget had significantly declined in recent years. At the same time, the site wanted to build a recapitalization fund for replacement of its aging exhibits. However, these narratives also highlighted some concerns about whether new programs or policies would damage the site's cultural integrity. In this section, I discuss three narratives to illustrate my interpretation.

In the first narrative, the manager discussed his plan to generate more revenues at the site, through seasonally adjusted admission fees. The manager believed that summer visitors would show little price sensitivity, and would pay higher admission fees. At the same time, he wanted to lower fees in the off-season, when visitation rates dropped significantly. In the manager's view, lower admission fees outside the peak summer season would encourage local people to visit the site more often, boosting its overall revenues.

The manager justified this proposal with arguments based on supply and demand and competitive dynamics. Specifically, the manager argued that the site needed to compete with other organizations, primarily in the private sector, which were also trying to attract tourism dollars.

> We're part of the tourism industry. Our visitation graph -- I'll show you `cause I recently -- Our visitation graph is clearly, uh, clearly seasonal. And that being the case, the admissions policy should reflect that. It should reflect it because pricing should be a function of demand, which our competitors are doing. (Interview with Manager, 1994, Lines 80 to 84).

However, the division had not approved his proposal. Managers at the division-level argued that the site's main purpose was to preserve and interpret the Blackfoot culture, not to engage in competitive dynamics with private-sector organizations in the tourism industry. They believed that admission fees should remain high throughout the year, to reflect the site's high-quality facility and exhibits. Although the manager agreed that HSIBJ had a unique cultural mandate, he argued that they still needed to view their programs and exhibits as a "product".

> . . . [Quality] does not reflect necessarily the demand for our quote unquote product. So people don't . . . want to look at . . . what we do here as product. They consider that a diminishment to what we do. . . . I agree with them upstairs, that's not all that we do. We have to balance that perspective with a preservation and education mandate. But we are also living in a real world and money is very important to the government these days. And our budgets are being radically cut and so this [proposal] was a very common sense way to make more money. (Interview with Manager, 1994, Lines 170 to 182).

In this narrative, I am suggesting that the manager constructed the site as The Trickster, as a collective actor that played an ambiguous role with respect to culture. The manager recognized the importance of the site's mandate to preserve and interpret the Blackfoot culture. However, the manager also constructed the site as a social actor that wished to exploit that culture for financial gain. The manager believed that the site could compete against private-sector organizations by adjusting admission fees during the year. Therefore, my interpretation suggests that the manager constructed the site as an actor that was motivated by financial gain, as well as cultural ideals.

My interpretation of a second narrative also illustrates the site's ambiguous role in relation to the Blackfoot culture. In 1994, the facility manager spoke about another plan to generate higher revenues at the site. In partnership with the Piikani Nation, he hoped to open a teepee campground on the prairie directly below the building. Visitors would have the opportunity to camp overnight in an authentic teepee, which the Piikani Nation would provide in exchange for half the revenues. The site would supply the other camping necessities, such as firewood. The manager was hopeful that the teepee campground would become a significant "revenue producing" program at HSIBJ.

By 1997, the teepee campground had achieved an occupancy rate of 40 per cent. The facility manager hoped to boost the campground's occupancy and therefore revenues, by advertising the program to potential European visitors.

> Our major market for the teepee packages are Europeans. . . . The two international tour companies that we've got, one is out of Holland and one is out of the UK. And they are the ones wanting this [campground] package. The people want to play cowboys, and the Germans are pretty nuts about cowboys and Indians. So that would be a good market for us [too]. (Interview with Manager, 1997, Lines 134 to 145).

My interpretation suggests that the manager wanted to exploit a stereotypical view of the Blackfoot culture that was held by a segment of international visitors. He was motivated by the significant profit potential of the campground program.

> [T]he profit centre for us is when we sell [the teepee camping experience] as part of a package. We stand to make a lot of money on that. . . . [If] we can sell these more and more, we can make a good buck on them. (Interview with Manager, Lines 68 to 76).

In this narrative, it is my view that the manager constructed the site as The Trickster, an ambiguous social actor. As The Trickster, the site wanted to provide an `authentic' Blackfoot camping experience, selling visitors the opportunity to camp in a Piikani teepee. In that sense, the site stood for the cultural ideals of the Blackfoot people. However, to achieve greater revenue, the manager was willing to appeal to the stereotypical views held by some international visitors about the Blackfoot culture. That is, as The Trickster, the site was willing to exploit the Blackfoot culture, to boost its overall revenues.

Finally, a third narrative also illustrates the manager's ambiguous or even capricious views toward attaining financial gain from the Blackfoot culture. The manager explained that film crews often contacted him for permission to film in and around the site. The manager did emphasize to them that they must show appropriate respect for the site and its sacred surroundings. However, in recent years, the manager also instituted a small fee for access to the site. This fee was typically $300 to $400 in amount, but was waived if the filmmakers represented non-profit, educational organizations. Interestingly, private-sector filmmakers had expressed surprise that he would expect them to pay for access to a cultural site. In their view, the centre was compensated adequately through free publicity when the film aired. However, in the manager's view, the site also needed some financial compensation in exchange for allowing access to their representation of the Blackfoot culture. "Again, it is a making money thing. Everybody used to – film producers used to come in here to film, anybody, it doesn't matter. Now they don't come on site without paying." (Interview with Manager, 1997, Lines 1878 to 1880). He compared his demand for payment to the charge to run advertisements when a television network aired the HSIBJ footage. "So I said `Tell me, are you selling commercials on this program?' `Of course we are.' `Well you are selling commercials and [so] am I.' (Interview with Manager, Lines 1889 to 1891).

Again, my interpretation of this narrative suggests that the manager constructed the site as The Trickster, an ambiguous social actor that that was willing to profit from the Blackfoot culture that it claimed to preserve/safeguard. There was a desire for film crews to show respect for the traditional culture. However, the manager also wanted to exploit the film crews' interest in the culture, instituting a fee for all commercial filming at the site.

It is important to note that not all employees at the site agreed with the manager's focus on revenue-generation. Indeed, my interpretation of the narratives suggests at least some of the Blackfoot employees were uncomfortable with the site's increasing focus on profit, arguing that it damaged the site's integrity. For example, one employee was concerned about the "cowboys and Indians" mentality behind the site's teepee campground. The same employee also commented on the increasing commercialization of the site's activities. She spoke about how she had finally suggested, during a business-planning session, "Well, why don't you just have a big herd of neon buffaloes going right over the cliff!" (Interview with Employee, 1996, Lines 642 to 643).

The facility manager also acknowledged that many of the First Nations employees did not want to develop revenue-generating programs, through exploitation of their traditional culture. In the employees' view, the division should meet the facility's funding needs.

> Making money around here . . . is seen by the Native staff as being necessary, but a necessary evil. It is not necessarily viewed as – they would prefer a more traditional approach where they are given the money [by the division]. . . period. But although I recognize that need, if not the desirability, of having to go and make money, they don't see the need at all. (Interview with Manager, 1997, Lines 444 to 448).

However, the manager believed that the site needed these revenue-generating programs, such as the teepee campground. He argued that they would ensure the long-term viability of the site, and therefore provide jobs for several Blackfoot employees. At the same time, he did admit that the site's new emphasis on profit was discordant with Blackfoot views about how to preserve and interpret the traditional Blackfoot culture.

> I'm a non-Native, and when I push these things I try to say, `Look-it, we need the jobs. You want the job, you want this place to survive, we need the money.' And there is a – that is certainly true too! Their point of view, and it's almost as valid too, is that the more we sell, the more we get into pandering, and the more the chances are that we'll be accused of cultural theft. (Interview with Manager, 1996, 739 to 744).

In summary, my interpretation of the narratives suggests that HSIBJ was ambiguous in its approach to representing the Blackfoot culture. As described in the previous section, the site represented the cultural ideals of the Blackfoot peoples through authentic programs and exhibits. However, the manager acknowledged that the site's recent development of profit-oriented programs could be perceived as both selling the culture and pandering to the cultural stereotypes held by others. Indeed, as the site continued to profit from its representation of the Blackfoot culture, it could be viewed as a cultural thief, a role antithetical to that of culture hero.

Summary

To summarize, my interpretation of the narratives in the HSIBJ interviews identified two themes. These themes supported my idea that the site was a social actor, with a distinct, ambiguous identity that I could represent with the name `The Trickster'. First, I found that the site was constructed as a culture hero for the Blackfoot people. The site's mission or mandate was to preserve and interpret the Blackfoot culture. Although the provincial government owned the site, the Blackfoot people were acknowledged as moral co-owners. Through its authentic exhibits and high-quality facility, the centre encouraged the Blackfoot and other First Nations people to be proud of their cultural heritage. As The Trickster, or creator-god, the site also helped to preserve the Blackfoot belief in their cultural origins. The site's programs and exhibits were carefully designed to acknowledge the Blackfoot as the original inhabitants of the region.

Second, my interpretation of the narratives also found that the site was constructed as an actor that was selling the culture of the Blackfoot people. To increase site revenues, the manager had begun to emphasize profit, and de-emphasize the site's mandate to preserve and interpret the Blackfoot culture. In a sense, the facility manager wanted to position the site within the competitive tourism industry, rather than within the public sector as a cultural organization. The manager acknowledged that others at the site were troubled about the potential damage to the site's cultural integrity from profitable programs such as the teepee campground. That is, he recognized that HSIBJ's recent revenue-generating programs could lead the site to `pander' to certain stereotypical views of the Blackfoot culture. I am suggesting that the site developed a second antithetical role as part of its identity, when the manager sought to increase revenues through selling a stereotypical version of the Blackfoot culture.

Organizational Identity and Interorganizational Relations

As described in Chapter Four, my journey through the interorganizational literature suggested to me that organizational identity was the key to understanding interorganizational relationships. The site's identity became the frame within which the facility manager interpreted the motives of other actors and vice versa. The manager reconstructed or contested the site's identity as The Trickster, the ambiguous cultural advocate for the Blackfoot people. My conceptualization also explained how the site would develop and maintain successful interorganizational relationships with other actors. The manager would try to persuade other actors to enter into an IOR, to achieve their own goals while helping the site to uphold its roles in representing and perhaps commercializing the Blackfoot culture.

In this second section of Chapter Six, I support my assertions using illustrative data from my interpretation of the narratives in the HSIBJ interviews. Again, the section is organized with four broad categories of actors: the division, the community, the visitor, and the Friends of Head-Smashed-In Buffalo Jump. I begin with the HSS division.

The Division

Only a few narratives in the HSIBJ interviews referred specifically to the division or division-level managers, suggesting that the manager did not view the division as an important actor in the site's external environment. My interpretation of these narratives suggests that the manager believed the division's motives were incongruent with those of the site. As a result, the division often prevented the site from achieving its goals. In this section, I present two narratives to illustrate how the site's identity, along with concepts that reflected key elements of interorganizational theory, led to this interpretation of the division's motives. The first narrative is presented in more detail, to illustrate my argument. The second narrative is presented in a shorter form, to substantiate the argument.

In the first narrative, the facility manager described how the division had recently lowered the overall budget for HSIBJ. According to the manager, the parent department of the HSS division had recently "inherited" the provincial portfolio for senior citizens. He believed that the division was privileging the budgetary needs of seniors-related programs, because the Premier was interested in the special needs of this demographic group. Along with health, education and social services, senior citizens' issues were one of the top priorities for the Premier and his cabinet. Unfortunately, this created budget shortages for HSIBJ and the other cultural sites.

The facility manager believed the division had political motives for interacting with the site. The division wanted to use the site's resources to meet the needs of the seniors, an important demographic group for the provincial government. In that way, the division could maintain a positive relationship with the legislative branch of government. However, the facility manager did not believe the division's interests in the site were legitimate, and was unhappy about the reduction in their resources.

In contrast to the political interests the manager imputed to the division, he enacted the site as a legitimate actor with unmet budgetary needs. As a culture hero for the Blackfoot people, the site needed to maintain high-quality programs and exhibits to represent the Blackfoot culture. When the division reduced the site's budget and number of positions, it was less able to accomplish this. As a result, the site's identity became more ambiguous, as it turned to `selling' the Blackfoot culture through revenue-generating programs.

In the second narrative, the manager described a similar interaction between the division and HSIBJ. He mentioned that the division had recently cut three permanent positions in the Southern Alberta region, including one position at HSIBJ. These staff cuts had shocked the staff at HSIBJ and the other sites. In the facility manager's view, the division had protected the positions of its own staff. However, the division expected the sites to agree that it was necessary for them to privatize and contract out some of their own operational services. "That's a cause for demoralization and some degree of cynicism." (Interview with Manager, 1996, Line 404).

My interpretation of this narrative suggests that the site's identity as The Trickster provided the context through which the manager interpreted the motives of the division. In his narrative, the manager constructed HSIBJ as the collective actor that represented the cultural ideals of the Blackfoot people. As a culture hero, the site's goal was to provide authentic exhibits in a high-quality facility. To accomplish this, the site needed to maintain control over the quality of programs and exhibits. As such, the division was enacted as an actor with economic interests in the site. The division wanted to maintain its own budget and staff levels, by instituting cutbacks at the cultural sites.

Manager's construction of success in incorporating the division. My interpretation suggests that the manager's narratives construct an unsuccessful relationship with the division. In my view, the site's ambiguous identity as The Trickster provides an explanation for its failure to form a satisfactory relationship with the division. The Trickster was the culture hero for the Blackfoot people, but also wanted to reshape and sell that culture to boost the site's financial resources.

In its cultural roles, the site did not value the political and economic interests that it imputed to the division. The manager constructed the division as an actor that was motivated politically to maintain a relationship with the site. Through access to the site's financial resources, the division could help the legislative branch of the provincial government strengthen its relationship with the province's senior citizens.

However, the manager also imputed economic interests to the division, believing they wanted to use the site's resources to maintain their own staff and services, at the expense of the site's operations. As cultural hero, the site did not actively seek a strong relationship with an actor that threatened its ability to represent the Blackfoot culture.

The site's inability to incorporate the division into a successful relationship had negative repercussions for its operations. For example, by 1996 HSIBJ had not yet been allowed to institute its proposal to seasonally adjust admission fees, even though the division had begun the same practice at other cultural sites.

> [I]t's another . . . anomaly in our department. There are now interpretive centres who are allowed seasonal pricing. Not Head-Smashed-In, though. You know, it was my idea three years ago. So at the Ukrainian Village they have two tier pricing, and we're not allowed to do it here. (Interview with Manager, 1996, Lines 498 to 502).

The Visitor

All the interviews at HSIBJ included recurrent references to visitors, suggesting that the managers and other employees enacted the visitor as an important actor in the external environment. My interpretation of the managers' narratives suggests that he believed the site actually helped visitors to meet their needs. At the same time, through interaction with the visitor, HSIBJ constructed its ambiguous identity as The Trickster. In this section, I discuss that argument, using narratives from the interviews with the facility manager at HSIBJ.

Earlier in this chapter, I described how I believed HSIBJ's visitors helped to establish the site's ambiguous identity as The Trickster. First, the site served as a culture hero for the Blackfoot and other First Nations visitors, as well as other interested groups, through its authentic exhibits and quality facilities. Second, some people visited the site mainly because various programs reinforced their romantic, often stereotypical views of aboriginal North American culture. The manager believed that all types of visitors had legitimate interests in the site (e.g., Mitchell, Agle & Wood, 1997). Therefore, in the manager's view, the site should strive to meet the different needs of these different types of visitors.

Two additional narratives serve as exemplars of how HSIBJ endeavoured to meet the needs of the visitor, an actor that wanted access to the culture of the Blackfoot people. First, the manager described visitors' interest in archaeology-related educational programs at the site. During a recently completed, five-year archaeological dig at HSIBJ, the team had raised a protective structure over the dig. Upon conclusion of their dig, the team was ready to dismantle the structure. However, the manager had requested the division's permission to leave the "dig dome" structure in place. In his view, visitors to the site were interested in learning more about the archaeology of the buffalo jump. The manager believed that the public had this interest because it was exciting to view ancient tools and bones still embedded in their historical layers.

> Archaeology can be a very trendy thing, like dinosaurs, right, you know. `Well, this really is, you know, 4,000 year old level and these bones that are sticking out of there and this arrowhead is actually 4,000 years old.' That's exciting to a lot of people. (Interview with Manager, 1994, Lines 1543 to 1547).

My interpretation of this narrative suggests that the manager constructed the visitor as an actor that wanted exciting educational programs about the ancient culture of the Blackfoot. At the same time, he constructed the site as The Trickster, an actor that stood for the cultural ideals of the Blackfoot. As The Trickster, the site had the ability and motive to provide access to such exciting educational programs at the dig.

Second, in a partial 1996 narrative, the manager described recent programming additions at the teepee campground. For example, campground visitors now had access to interpretive programs on Native cooking and storytelling. Interested groups were also given guided hikes near the sacred Vision Quest hill, described earlier in this chapter. The manager jokingly referred to these hikes as "the lederhosen tour".

> What we mean is we've got Germans who like to go hiking. So, we'll take them up to our Vision Quest, which is a very spiritual part of this [site]. Um, it's about a 45 minute to an hour hike that – A fairly easy hike . . . but something that's unique to this place. (Interview with Manager, 1996, Lines 711 to 714).

In this partial narrative, my interpretation suggests that the manager constructed the visitor as an actor with complementary interests to those of the site. That is, he constructed the visitor as an actor that desired access to the spiritual side of the Blackfoot people. His interpretation also continued to construct the site's identity as The Trickster, an ambiguous actor that was willing to `sell' representations of the

Blackfoot culture. The manager wanted to encourage Germans and other Europeans to visit HSIBJ, and so developed a program that allowed greater proximity to the Vision Quest hill. Again, the manager viewed the visitors' interests as legitimate ones that the site should meet (Mitchell, Agle & Wood, 1997).

Manager's construction of success in incorporating the visitor. My interpretation suggests that the manager's narratives constructed HSIBJ as an actor that was largely successful in its attempts to incorporate the visitor into a useful relationship. That is, as cultural hero, the site was able to use its representations of the Blackfoot culture to deliver exhibits and programs that matched the interests of its visitors. According to the facility manager, HSIBJ received over 100,000 visitors each year (Interview with Manager, 1994). In the HSS division, only the Tyrell Museum and the Provincial Museum of Alberta attracted more visitors. According to the facility manager, HSIBJ also attracted a large number of international visitors – 12 per cent from overseas, and approximately 30 per cent from the United States. The centre was the primary destination for 60 per cent of its visitors.

However, subsequent interview narratives suggested that HSIBJ might be slowly losing its ability to maintain a strong relationship with the visitor. By 1997, admission revenue at the site was down by seven per cent (Interview with Manager). The manager explained that part of the decline was caused by a decrease in numbers of bus tour visitors. However, in his view, this slump was mainly due to fewer student field trips at the site.

> But the most dramatic decline in visitation in this facility – and it isn't our greatest profit revenue, but it is important. And it is our education program attendance and that was down 13.2 per cent. And that can be attributed directly to less money that schools have for field trips. So that has impacted on our revenue. (Interview with Manager, 1997, Lines 115 to 199).

Several years earlier, HSIBJ had implemented a dollar per student fee for most school field trips. This money was used to help fund the educational programs at the site. Therefore, a decline in school trips had a direct impact on the site's interpretive programs, and thus the site's ability to act as a culture hero for the Blackfoot people.

In summary, my interpretation suggests that the manager's narratives about HSIBJ's interactions with its visitors constructed the site's identity as The Trickster. Many visitors flocked to the centre to see authentic representations of the Blackfoot culture, while others wanted to `buy' romanticized or stereotyped versions of the First Nations culture. Thus, the interests of both these types of visitors constructed the site's ambiguous identity as The Trickster. However, in recent years, the site had seen a slight decline in its visitor rate. If that decline continued, HSIBJ might experience difficulties in constructing its identity as the site that represented the Blackfoot culture.

The Community

In an earlier section, I argued that the manager believed the site had little power in its relationship with the division. For example, the division was able to cut his budget, with no advance notice or justification. However, he believed that his knowledge of the site's local community partners was an important source of potential power over the division. ". . . [I]t's the one thing I have the most levers of power over, because bureaucracy doesn't understand the community or the stakeholders that I do work with." (Interview with Manager, 1996, Lines 1033 to 1035). If he could incorporate those community partners into a strong IOR, he believed that his relationship with the division would change. "Community relations is something that, you know – if I can motivate my community to get on side, they actually provide a fair amount of strength for this facility that the government would be very wary to go against." (Interview with Manager, Lines 1050 to 1053). In his view, strong IORs with the site's community partners would empower it to develop a more equitable IOR with the division. In this section, I present my interpretation of three narratives about the site's interorganizational relationships with two important community partners: The Piikani Nation and the town of Fort Macleod.

Piikani Nation. Earlier in this chapter, I discussed how HSIBJ's authentic representation of the Blackfoot culture partially helped to construct the site's identity as a culture hero for the Blackfoot people. The centre's high-quality facility and authentic exhibits helped the Blackfoot and other First Nations people develop a pride in their cultural heritage. In my view, two narratives exemplify HSIBJ's efforts to solidify a strong relationship with the Piikani Nation.

In the first narrative, the manager described the importance of his attendance at some medicine bundle opening ceremonies on the Piikani reserve. "Medicine pipe bundles are today considered the most sacred artifact among the Blackfoot . . ." (Brink, 1995, p. 6). Only qualified people, elders of the Piikani Nation, could own a medicine pipe bundle. The bundle contents included a pipe bowl and stem, along with tobacco leaves. Typically, medicine bundles were opened annually, often at the time of a Sun Dance, ceremonially blessed and replenished with fresh tobacco.

In his narrative, the facility manager said that he went to bundle-opening ceremonies because he was "a part of native culture and it's my way of showing respect to the bundle-owner" (Interview with Manager, 1994, Line 2325). The manager did not go to all the bundle-opening ceremonies, as each ceremony lasted for several hours. However, as the facility manager, he made it a point to attend ceremonies that were linked to important stakeholders of the site. In his view, he needed to attend these ceremonies to maintain a positive relationship with key elders of the Piikani Nation. In that way, he ensured that Piikani elders would willingly assist HSIBJ with important cultural issues.

> Well, what happens if I don't go to a bundle opening? Well, nothing really, but, I mean, it would be over a period of time the Jump would be less well respected by the Peigans. And they would be less willing to advise us and do certain favours for us. And they may get angry, for instance, and do something that would – wouldn't be good for our visitation, or our visitors or programs. (Interview with Manager, Lines 2380 to 2384).

For example, several years earlier, two elderly people had died of heart attacks while visiting HSIBJ. At the urging of the Piikani Nation and Piikani employees, the site was closed temporarily so that Piikani elders could bless it.

According to the manager, HSIBJ and the Piikani Nation were jointly accountable to each other. The site wanted to ensure that Piikani elders were available for consultation about programs and exhibits, and special concerns such as the deaths of visitors at the site. In return, the Piikani Nation wanted to ensure that the site took "good care of their buffalo jump." (Interview with Manager, 1994, Line 2394).

My interpretation suggests that the manager also believed that the Piikani interacted with the site to ensure that their culture was portrayed with respect and accuracy. This belief of the manager also served to re-construct the site's identity as the culture hero for the Blackfoot people. In his narrative, the manager argued that the site was "a part of the culture". As such, the site acted as a culture hero, upholding the cultural ideals of the Piikani Nation.

The manager believed that the Piikani Nation was an important stakeholder of the site, with a legitimate interest in its activities (Mitchell, Agle & Wood, 1997). As such, the site had an obligation to ensure that the buffalo jump was maintained properly and represented appropriately. To ensure that they met the needs of the Piikani Nation, the site consulted regularly with Piikani elders.

In the second narrative, the manager spoke about the site's annual powwow, and its importance to the Piikani Nation. Every summer, the site held a powwow on a field below the site. The powwow was a large attraction, drawing people from as far away as California. The event was costly to host, with a net loss of $34,000. Despite those annual losses, the manager argued that HSIBJ needed to host the powwow. ". . . [T]he powwow would have to stay. I mean, that's cultural, as well as the expectations of tourism, so we have to do it." (Interview with Manager, 1996, Lines 1987 to 1989).

The official purpose of the powwow was to commemorate the site's royal opening in the 1980s (Interview with Employee, 1997). However, the manager's narrative suggested that the powwow was financially important to the local community, and allowed the site to give back to one of its key stakeholders – the Piikani Nation. "There is [prize] money [for the dancers] distributed at the powwow which is important for this community. So, it's our way, in a sense, of [showing] allegiance to one of the community stakeholders . . . . In one way, we look at it as a payment to the community for its continuing support of us." (Interview with Manager, 1996, Lines 1990 to1997).

My interpretation of this narrative suggests that the manager constructed the Piikani Nation as an actor with complementary interests to those of the site. The manager believed that the powwow provided an essential opportunity to repay an important, supportive stakeholder. That is, the manager enacted the Piikani Nation as an actor that wanted HSIBJ to represent its cultural interests, through hosting the annual powwow. Therefore, his understanding of the Piikani's interest in HSIBJ also served to construct the site's identity as The Trickster. That is, as he reflected about the site's interactions with the Piikani nation, he developed the belief that they had a valid, economic interest in HSIBJ. The powwow was a significant cultural event, which provided important financial resources to the community.

A short, partial narrative by a Piikani employee corroborated my interpretation of the powwow's cultural importance to the Piikani Nation, and therefore, the site's role in preserving the Piikani culture. In this employee's view, the powwow provided an opportunity for young children to learn the Blackfoot culture.

> ". . . [T]hey have their own special dance. These are children learning our way of life. They are six and under, and they get out there and strut their stuff. Oh, you should see them. They are so cute. And we pay them whatever money we get [in donations from the people at the powwow]." (Interview with Employee, 1997, Lines 168 to 171).

Town of Fort Macleod. According to the facility manager, the town of Fort Macleod was also an important community stakeholder for the site. Therefore, it was surprising that only one narrative centred on this actor. In 1994, the manager told how he hoped to boost visitation, and therefore site revenues, through a relationship with Fort Macleod businesses. As part of the arrangement, HSIBJ authorized the local businesses, such as motels, to sell discounted admission tickets for the site. In return, the site gave the businesses a "cut" of the related admission revenues. The manager believed that the arrangement provided financial advantages for both actors, and thus encouraged the businesses to continue the IOR. The businesses "... help us make money so they can make money.... They get a cut, so that ties them into – you know." (Interview with Manager, 1994, Lines 1086 to 1088).

In this narrative, the manager correlated the motives of the site with those of the local businesses. Specifically, he argued that both actors were motivated by increased access to financial resources. My interpretation suggests that the site's ambiguous identity as The Trickster provided the frame through which the manager interpreted the other actor's interests. As I argued earlier, HSIBJ's organizational identity was characterized by ambiguity. The site was the culture hero for the Blackfoot people, yet would also `sell' or stereotype that culture to attract additional financial resources to the site. As The Trickster, it was believed that local businesses would also like to increase their financial resources, through a mutually beneficial association with the site.

According to RDT, organizations will enter into mutually dependent relationships, to exchange resources and thus reduce their environmental uncertainty. In this narrative, my interpretation suggests that the manager argued that the local businesses entered into a relationship with the site to receive a "cut" of the discounted admission tickets. That is, the relationship would reduce environmental uncertainty for local businesses by providing additional financial resources. At the same time, HSIBJ hoped to reduce its own environmental uncertainty with increased admission revenues.

Manager's construction of success in incorporating the community. Based on my interpretation of the narratives, I am suggesting that the manager constructed only partially successful IORs between HSIBJ and the community. Neither the Piikani Nation nor the town of Fort Macleod agreed with all the site's programs and activities. Therefore, HSIBJ was unable to successfully incorporate both actors into a stable IOR. In my view, the site's identity as The Trickster provides an explanation.

The site formed a successful IOR with the Piikani Nation, when it acted as a culture hero for the Blackfoot people. That is, when the Piikani believed that the site wanted to preserve their traditional culture, then they wanted to develop a strong IO relationship with HSIBJ. For example, the annual powwow was a successful event, well attended by Piikani and other First Nations peoples.

However, my interpretation suggests that the IOR was not successful, when the site acted in ways that stereotyped or commercialized the Blackfoot culture. This analysis is corroborated by an employee's statement that the Piikani Nation believed the government and HSIBJ were profiting from their culture.

> The story I have heard from the elders on the reserve . . . [is] this [buffalo jump] belonged to our people. And now they see it as the government took over this place and is making money on it. And none of it is going to the reserve except for the few people working here. (Interview with Employee, 1997, Lines 388 to 393).

In an attempt to "smooth things over" and "develop a good working relationship", she stayed in close contact with the Piikani and Blood elders, ensuring that they were invited to all special events at the site.

In my view, the site also had limited success in incorporating the town of Fort Macleod into an ongoing relationship. Admittedly, some townspeople did support the site, as evidenced by their attendance at special events such as the powwow, and their willingness to serve on the Advisory Board. However, according to the manager, a strong local faction believed that the site should close in the off-season to save operating expenses.

> This is a fairly conservative - as you may well imagine - community here in Southern Alberta, in Fort Macleod. [There's a group of people in this community] that would like to close us in the winter completely, save money. And there would be [a] saving. It's undeniable that there would be. (Interview with Manager, 1994, Lines 1693 to 1697).

The site's ambiguous identity as The Trickster provides an understanding of its inability to completely incorporate the town of Fort Macleod. As The Trickster, the site was the culture hero for the Blackfoot people, yet was also willing to commercialize that culture for economic reasons. As I described earlier in this section, the site tried to incorporate the town of Fort Macleod into an IOR, by appealing to its economic interest in the centre. As The Trickster, it was believed that the town had economic motivations for its interactions with the site. However, the site also hoped that the town would recognize the site's legitimate need for year-round operations to represent the Blackfoot culture. The manager's interviews included no narratives that constructed the town as an actor that shared that view. Therefore, I am suggesting that the site was unable to successfully incorporate the town into a stable IO relationship.

The Friends of Head-Smashed-In Buffalo Jump

Based on the paucity of narratives in the manager's interviews about the site's IO interactions with the Friends, it is tempting to conclude that the Friends society was not an important IO partner for HSIBJ. However, the manager's 1996 interview included several comments or partial narratives, in which the manager contrasted the site's successful IOR with the Friends, to its less successful IOR with the division. That is, he constructed the site's IOR with the Friends as highly cooperative and mutually beneficial. The manager worked to ensure that HSIBJ and its Friends society appeared "unitary" in their interactions with other external actors. Indeed, he argued that the Friends society was the only actor that truly understood how the site could succeed in achieving its goals.

> We will not find ourselves disagreeing in public together. If we do, we will talk about it because we've got – because again, we know who makes this place work. You know, the people on site know what's going on a lot more than people off site." (Interview with Manager, 1996, Lines 1907 to 1910).

Together, HSIBJ and the Friends society made the daily decisions that allowed the site to continue its existence.

> We solve problems between the two of us on a daily basis. Some things, most of the things would be minor. . . . So we have to – we have a very positive, close relationship and we're both committed to it out of pure survival." (Interview with Manager, Lines 1662 to 1667).

However, by 1997 the manager constructed subtle changes in the site's IO relationship with the Friends, as shown by my interpretation of a partial narrative in that interview. As I described in Chapter Four, in July 1997 the division entered into annual cooperating agreements with the Friends societies at each site. These agreements stated that the Friends society would collect the admissions at the site, and then use those funds to provide the site with interpretive and other services. Essentially, the Friends society became the legal employer of all non-government employees, and controlled the funds for most program-related decisions.

By October 1997, the manager admitted that the cooperating agreement at HSIBJ had led to problems in the site's IO relationship with the local Friends society. He believed that it was important to maintain a strong relationship with the Friends, to run the site on a daily basis. However, a "tension" in the IOR had developed, because the cooperating agreement had "diminished" his decision-making role on expenditures at the site. Now, he had to convince the Friends society about how to best spend the admission funds that they had collected on behalf of HSIBJ. "I am as much a negotiator as an actual expenditure officer. Often, I have to negotiate the expenditures instead of saying what we are going to spend money on." (Interview with Employee, 1997, Lines 1543 to 1545).

My interpretation suggests that the manager constructed the Friends as an actor that wanted to control expenditures and, by extension, programming decisions at the site. As cultural hero, the site wanted to represent the Blackfoot culture through accurate, high-quality exhibits and programs. The manager enacted himself as "an actual expenditure officer", or the individual that should have made financial and programming decisions on behalf of the site. His proposed activities would allow the site to maintain its role as the culture hero of the Blackfoot people. According to the manager, the Friends society was only "fairly cooperative" in allowing him to execute his plans for HSIBJ.

According to resource dependence theory, organizations enter into IO relationships, to gain access to resources and thus reduce environmental uncertainty (Pfeffer & Salancik, 1978). The site entered into a cooperating agreement with its

Friends society to ensure that its admissions revenues did not become part of general provincial revenues. However, as a result, the IO relationship was now characterized by power-dependence (Emerson, 1962). That is, HSIBJ was now dependent on the Friends society for access to key financial resources. The manager was forced to negotiate with the Friends to gain their approval of his proposed expenditures.

Manager's construction of success in incorporating the Friends society. In this section, I presented an interpretation to suggest that HSIBJ was not entirely able to maintain a successful IO relationship with its Friends society. In earlier years, the site had developed a cooperative relationship with the Friends society, in which both actors tried to achieve and present a unity of purpose to other external actors, including the division. That is, the manager at HSIBJ had previously constructed the Friends as an actor that both wanted to cooperate with the site, and was necessary for its ongoing operations.

However, after the Friends society began to collect the site's admission fees, my interpretation suggests that HSIBJ's ambiguous organizational identity as The Trickster prevented it from maintaining a successful IO with that actor. The manager began to construct the Friends society as an actor that used its legal power to query the manager's requests for access to the admission funds. That is, his construction of the Friends society began to contest the site's organizational identity. As the culture hero for the Blackfoot people, the site wanted to provide high-quality, accurate exhibits about the Blackfoot culture. It also wanted to sell a somewhat stereotyped version of the Blackfoot culture to attract financial resources for recapitalization of its exhibits. To accomplish this, The Trickster needed to use the site's admission fees to develop appropriate programs, and the Friends society was hindering those efforts.

Summary

In the HSIBJ interviews, I found evidence to suggest that the site had a unique organizational identity that affected its ability to form and maintain successful interorganizational relations. First, in this chapter, I presented my view that the site was unable to develop or maintain a successful relationship with the division. The manager did not accept the political and economic interests that he imputed to the division through his narratives. At the same time, the division hindered the site's ability to stand as a culture hero for the Blackfoot people, when it seconded funds and positions from HSIBJ, ostensibly for the province's senior citizens. That is, my interpretation suggested that the division contested the site's identity as cultural hero when it continuously postponed the site's recapitalization plans, and made it difficult for it to continue offering high-quality programs about the Blackfoot culture.

Second, Head Smashed-In Buffalo Jump was partially able to form and maintain relationships with the local community. This occurred because the manager constructed the two key community groups as actors with complementary interests to those of HSIBJ. The Piikani generally believed that the centre's exhibits portrayed their culture to visitors in an authentic and respectful manner, thus constructing the site's identity as cultural hero. They also valued the site as an economic resource with the benefits that they received from some centre-sponsored events, such as the annual powwow. However, my analysis also found that this IO relationship was not completely successful. In particular, the Piikani believed that the site and the provincial government generated large revenues from their culture and traditional lands, yet only a few members of the Piikani Nation shared in those financial benefits. Therefore, the Piikani Nation sometimes was brought into conflict over the site's ambiguous identity.

Similarly, the manager believed that the townspeople wanted to interact with the site, to receive spin-off economic benefits. However, the conservative townspeople also wanted the site to operate efficiently. In that sense, they did not appear to value the site's role to act as a culture hero for the Blackfoot people, despite the seasonality of its visitation. Therefore, my analysis suggests that the townspeople sometimes contested the site's identity, if they believed that the site was not acting efficiently.

Third, the site was partially successful in developing a successful IOR with the local Friends society. In earlier years, the Friends society was a cooperative IO partner for HSIBJ. Indeed, the two actors had worked together to represent the needs of the site to the division, and the Friends had assisted the manager with ongoing operational decisions at the site. However, in recent years the site's IOR with the Friends Society had deteriorated. After the institution of cooperating agreements, the Friends tried to wield their financial power to influence and change the manager's decisions on expenditures of admissions funds. The Friends had begun to contest the site's organizational identity, as the actor that represented the cultural ideals of the Blackfoot people through a variety of interpretive programs.

Finally, the manager constructed a successful relationship between HSIBJ and all visitors. Some visitors wanted access to an authentic representation of the Blackfoot culture, thus constructing the site as a culture hero for the Blackfoot people. Other visitors wanted access to the site's recent revenue-generating programs, which often portrayed a more stereotypical version of the Blackfoot culture. The site functioned as The Trickster, an ambiguous social actor that stood for the cultural ideals of the Blackfoot, yet was commercialized to attract necessary resources. The manager interpreted both visitors' interests in the site as legitimate ones. HSIBJ formed a successful relationship with visitors, because they accepted the site's identity as The Trickster, an ambiguous culture hero for the Blackfoot people.

Chapter Summary

In this chapter, I have described how I believe the HSIBJ's identity as The Trickster was constructed. That is, through narrative constructions around interorganizational interactions with the Piikani Nation and visitors, the site was constructed as a culture hero for the Blackfoot people. However, the site was unable to maintain successful IORs with certain actors (i.e., the division, the local townspeople and the Friends society), because those actors responded to different dimensions of the site's identity, thus reinforcing its role as The Trickster. The next chapter continues with a discussion of Remington-Alberta Carriage Centre.

Chapter Seven

The Deceiver

to deceive / v. 1) *tr.* make (a person) believe what is false; mislead purposely.
2) *tr.* be unfaithful to, esp. sexually.
3) *intr.* use deceit.
4) *tr. archaic* disappoint (esp. hopes).
deceive oneself persist in a mistaken belief. (Barber, 1998, p. 362).

In this chapter, I present my analysis of the narrative material in the five interviews done with the manager and other government employees at the Remington-Alberta Carriage Centre (RACC). The chapter includes two main sections: narrative construction of the site's identity; and the role of the site's identity in its interactions with other actors in its interorganizational environment. My key assertions are illustrated with quotations from the interviews at RACC.

Narrative Construction of Identity: The Deceiver

As described in Chapter Four, after I reviewed the initial field material, I began to see RACC as a collective social actor, with a unique organizational identity. That is, I saw the site as The Deceiver, a social actor that had misled the local community about the numbers of visitors it would attract. As such, the mistaken belief that `improved' marketing and interpretive programs would attract more visitors to the site also persisted. I argued that this organizational identity was constructed through its ongoing interorganizational relationships. That is, I am suggesting that the manager at RACC continually asserted that the site's unique, world-class carriage collection could eventually attract a broad cross-section of visitors, despite its poor location and the limited scope of its collection.

In this section, I summarize my interpretation of the RACC manager's narrative construction of the Centre's organizational identity. The section is organized around two main topics: disappointing visitation at the site, and optimistic plans for growth. Once again, I am suggesting that both these topics support my initial insights about the site's organizational identity as The Deceiver.

Disappointing Visitation at the Site

Before RACC was built, the province projected that the site would attract many thousands of visitors each year. Unfortunately, once built, the site's actual visitation rates were far below the anticipated numbers. Indeed, the interviews with most RACC employees included several references to the site's disappointing visitation statistics and their frustration over its apparent inability to attract more visitors.

> We would like to see a lot more visitation here, but we take comfort in [the] fact that the people who do come rave about the place. . . . So once we get people in the door they are very pleased. The problem is getting people in the door. (Interview with Manager, 1997, Lines 633 to 651).

The facility manager and other government employees did not understand how the province could have arrived at such optimistic predictions for visitation. The facility manager speculated that government officials had believed the projections presented in the division's marketing plan simply "because that was what they wanted to hear." (Interview with Manager, Lines 1374 to 1375). At any rate, in retrospect, the predictions were unrealistic. "They had visitation figures in [the winter months] where we would be drawing thousands of people. Where are they going to come from? There is no one on the road. There is no nearby population centre . . ." (Interview with Employee, 1996, Lines 1276 to 1279).

The government employees at RACC discussed three contributing causes for the site's low visitation. First, they believed that visitation was low because of the Centre's "less than ideal" location (Interview with Manager, 1995, Line 161). Head-Smashed-In Buffalo Jump, another HSS site in the southern Alberta region, was located near the intersection of three well-travelled highways. In comparison, RACC had a much more remote location in the small southern Alberta town of Cardston.

The Centre was built in Cardston for a variety of reasons. Don Remington, a well-known Cardston resident and member of the ruling provincial Progress Conservative political party, donated his carriage collection to the province of

Alberta. However, he had stipulated that the collection must remain in Cardston (Interview with Employee, 1996). The division believed that the site could attract many people from the two million annual visitors to Glacier National Park, nearby in Montana, U.S.A. (Interview with Employee, 1996). At the same time, the province had embarked on building a system of cultural sites around the province. The government believed that the system of sites would provide significant spin-off economic benefits for small communities throughout the province. Therefore, the facility manager thought that the province might have used such an economic argument to justify building the Centre in Cardston (Interview with Manager, 1996).

Second, the manager argued that visitation was poor because of the collection's narrow focus on Victorian, horse-drawn carriages. As a result, the collection was most alluring to senior citizens and those interested in horse-drawn vehicles. "Tyrrell is very successful. Head-Smashed-In is very successful, because they have a product that [is] sexy. Indians are sexy. So are dinosaurs. . . . [A carriage is] a very, very focused product. It doesn't have wide appeal." (Interview with Manager, 1995, Lines 161 to 170).

Third, another government employee suggested that visitation at RACC was low because of the general public's inaccurate perception of carriage collections. Visitors to the site often said that they found it much more interesting than they had expected.

> We have people express that all the time. They had no idea. That is great, but we know for every one who says that and comes here, there are ten more who say that and don't come here. So how do you break that perception barrier of museums, generally and [a] carriage museum in particular? Old and stuffy, and not very interesting. (Interview with Employee, 1996, in Lines 633 to 651).

The Centre was constructed as an actor that would bring great economic benefits to the community of Cardston, by attracting large numbers of visitors to the carriage collection. However actual visitation at the site was much lower than expected and the hopes of the community were disappointed. RACC was false and had misled the community.

Optimistic Plans for Growth

Provincial government cutbacks meant that RACC and the other cultural sites were under pressure to improve their financial sustainability through implementation of the required business plans. In some ways, RACC was under greater pressure than many of the other sites. The site had low visitation, especially in comparison to its operating budget. RACC's operating budget was higher than many other HSS sites, including HSIBJ, because it had to sustain both the carriage collection and its horse program. That is, the Centre incurred significant ongoing costs for restoring and preserving the carriage collection, and stabling the horses needed for carriage rides and rentals.

In the manager's view, the site's revenue-generation possibilities were seriously hampered both by its remote location and its "focused product" (Interview with Manager, 1995, Line 169). However, he also identified two positive features. First, RACC was known for its courteous and helpful staff, which contributed to the Centre's high visitor ratings. Second, the manager believed that, through marketing, he could increase the number of visitors at the site. In particular, he speculated that new, carriage-related programs would increase visitation and therefore site revenues, without ruining the `product'. As another government employee said, "With that kind of [positive] interest from the public, and specifically the carriage-interested public, that means it can only grow." (Interview with Employee, 1996, Lines 1371 to 1372). In many ways, the manager persisted in the mistaken belief that the site could generate greater revenues through increased visitation and alternative programs. Two exemplar narratives illustrate this second identity-related theme.

First, in 1996, the facility manager told a lengthy narrative about the Centre's cost recovery programs. These programs included birthday parties held at the site, and rental carriage rides for wedding parties. According to the manager, RACC's "most lucrative" but "spotty" revenue-generating program was the restoration of private horse-drawn vehicles (Interview with Manager, 1996, Line 1283). The curator and his assistant spent all their time on this cost recovery program, rather than on restoration and preservation of RACC's own carriage collection. However, the program was profitable only because the costs for materials and labour were not charged to the restoration projects. The manager paid for the necessary materials from the site's operating budget, while labour costs were covered by an internship program offered through the University of Calgary. In partnership with the Cardston Chamber of Commerce, the site also offered a trolley service between RACC and the businesses on Cardston's Main Street. Their goal was to encourage people both to shop in town and to tour the Centre. Unfortunately, their joint venture was unsuccessful. As a result, the site's revenue generation programs had just managed to break even in the previous year.

The facility manager persisted in a mistaken belief about the potential success of its alternative programs, and misled itself and other actors about its long-term financial viability. The manager believed that the site could generate significant revenues through alternative programs, such as birthday parties and private-vehicle restoration. However, the site was supporting all those programs through its operating budget, which was meant to provide preservation and interpretation of the carriage collection. Although the programs did generate some new revenues, they could potentially incur net losses for the Centre. Also, the curator and his staff were unable to fulfill their mandate to preserve and maintain the Centre's carriage collection.

> Positions in the whole shop have been totally subverted to cost recovery [programs]. The original idea, of course, was that these guys were supposed to, ah, help restore our collection over a period and maintain our collection over a period. It doesn't happen any more. They're a hundred percent committed to making money to jobs for private owners of vehicles . . . . (Interview with Manager, 1996, Lines 1291 to 1295).

The next year, the manager told another lengthy narrative about his plan to expand the Centre's horse program. In 1997, RACC owned 14 horses, which it used for its summer-time carriage rides, as well as private carriage rentals. The manager proposed to the division that the site should nearly double its current number of horses. He hoped they would eventually own as many as 17 pairs of horses, representing a variety of different breeds. The aim was to increase visitation by marketing both the site's carriages and its unique horse program.

> I sat down and tried to analyse: a) the kind of people we are getting visiting here, and b) were they effectively a large enough segment of the population to make this place successful? And the answer was "no". You can't run a large museum on devotees to a . . . focused product. So I had to broaden the product. . . . So I thought, "Let us [go] carriage related", which will have a broader appeal. And a living horse. . . . And there is no other all-breeds collection in western Canada, or west North America, strangely enough." (Interview # 16, 1997, Lines 760 to 771).

Effectively, the proposed horse program would broaden the focus of the site's `product', to attract visitors interested in horses, in addition to those interested in horse-drawn carriages.

The division did not approve the proposal, claiming that it was "illogical" (Interview with Manager, 1997, Lines 782 to 783). The manager disagreed, arguing that the program was "a winner", which could potentially double RACC's current visitation (Interview with Manager, Line 795). Nevertheless, he did acknowledge that the full program would be costly, at $34,000 annually. More importantly, he admitted the inherent difficulties in trying to build the herd, while simultaneously building the additional visitation needed to cover the program's costs.

> I am basically chasing a – I am risking everything here, because I have to start building that herd. But until I get the visitation to come see that herd, I won't have enough money to hire someone else to help [the groom] out. It is a bit of a gamble. (Interview with Manager, Lines 746 to 749).

The manager persisted in the mistaken belief that he could significantly increase visitation through refining the site's current `product'. That is, by adding a multiple-breed horse program, the manager argued that they might double their current visitation statistics. However, the manager had presented no firm evidence that a permanent horse program would increase its visitation. The site continued to mislead itself and other actors about its potential to attract more visitors by broadening its `product'.

The manager constructed the site as an actor that would attract more visitors, through alternative programs, sometimes unrelated to its core carriage collection. However, these programs often diverted resources away from the preservation and interpretation of the carriage collection. Also, the planned benefits for new programs were often unsubstantiated. The RACC supported a mistaken and misleading narrative about the significant benefits of developing a broader, yet still carriage-related focus, through alternative programs.

Summary

My interpretation of the narratives in the RACC interviews identified two themes, which supported my belief that the site had a distinct organizational identity I could represent with the name `The Deceiver'. First, the site's visitation was disappointingly low. Before the Centre was built, its marketing plan suggested that large numbers of visitors, attracted from nearby Glacier National Park in Montana, would create significant economic spin-offs for the town of Cardston. However, the narrowly focused collection did not attract the promised visitors. The site misled the local community, and disappointed their hopes for economic growth.

Second, there were optimistic plans for future growth of visitation, and therefore revenues. To increase the Centre's visitation numbers, but especially its revenues, the manager developed alternative programs such as paid restoration of privately owned horse-drawn vehicles. However, these programs could potentially incur more costs than revenues, and diverted resources from the carriage collection. The manager also proposed a multiple-breed horse program, which he hoped would double the site's annual visitation. Unfortunately, he had no data to support his assertion on the potential demand for such a permanent program, and admitted that it would be difficult to implement. There was a persistent mistaken belief that these programs would lead to significant increases in visitation and revenues.

Organizational Identity and Interorganizational Relations

My review of the literature, presented in Chapter Four, suggested that organizational identity had an important influence on interorganizational relations. I proposed that the site's meaning for existence became the lens through which the manager identified and interpreted the other actors in its external environment, and they interpreted the site. The manager reinforced the site's identity as The Deceiver, the misleading disappointer of hopes held by other actors. Based on his interpretation, RACC's manager would then try to incorporate other actors into a successful IOR. That is, the manager would convince them to help the site to achieve its goal of increased visitation, while they simultaneously achieved their own goals.

In this section, I illustrate these arguments with my interpretation of the narratives from the five FSIC interviews. Once again, I organize the section with four broad categories of actors, as represented in the managers' narratives: the division, the community, the visitor, and the Friends of the Remington-Alberta Carriage Centre. The section begins with the HSS division, a key actor in RACC's external environment.

The Division

Almost one-half of the RACC manager's narratives were about the division, or division-level managers, suggesting that the manager believed the division was a critical partner for the site. In the manager's view, the division had illegitimate economic motives for interacting with the site, and thus would not help it to achieve its goals of increasing visitation to its world-class carriage collection. In this sub-section, I present my interpretation of three narratives to illustrate how I believe the manager developed this understanding of the division.

The first narrative was about the recent business plan produced by the manager and others at the Centre. The manager opened the narrative, by stating his cynicism about the business planning process within the division. His primary concern was that the division encouraged the sites to develop programs and marketing techniques, even though division-level managers had little "real world" experience, nor knowledge of the `necessary' business concepts (Interview with Manager, 1995, Lines 309 to 310). Thus, they were unable to judge the likely success of each site's plans for revenue generation.

The facility manager made it clear that, in his view, division-level managers were not qualified to develop or implement business plans. As a result, he viewed his business plan as a meaningless document, of little value to daily operations at the Centre.

> "I can think of a lot better ways of making money. But they are less dramatic and they didn't come from [the division-level manager]. . . . They are all desperate for coming up with wonderful new ideas for making money. I don't think a lot of the ideas on further examination make a lot of sense. . . . There is no looking at the bottom line or return on investment. The whole thing is just smoke. I can't remember opening this [business plan] since I wrote it." (Interview with Manager, Lines 506 to 527).

The site's identity influenced the manager's interpretation of the division's motives. The manager did not value the programming suggestion of division-level managers, believing they were poorly conceived and unlikely to succeed. In his view, the division was motivated by the desire to build community partnerships and increase revenues, yet did not consider the financial implications of their plans. The manager did not value or accept the division's suggestions, because he believed that the division was an illegitimate actor, primarily motivated by its own political or economic interests (e.g., Freeman, 1983, 1984; Mitchell, Agle & Wood, 1997). When the division tried to impose its programming plan onto the site, the manager resisted, insisting that he was the best one to develop RACC's revenue generation programs.

The second narrative, from the 1996 interview with the RACC facility manager, was about an interaction with another division-level manager. In this narrative, the facility manager described how that division-level manager wanted him to develop a special event at RACC. Specifically, he wanted RACC to put on a large country and western concert. As in the previous narrative, he believed that the division was motivated by financial gain. "It doesn't matter what you do just about, as long as you generate money." (Interview with Manager, 1996, Lines 1479 to 1480).

The facility manager criticized this idea, arguing that it had been tried at another HSS site the previous year, and had been "an absolute, ferocious failure" (Interview with Manager, 1996, Line 1487). He believed that such an event would also fail at RACC. The facility's property was unfenced, and so he could not easily ensure that everyone paid to attend the event. Also, country and western concerts were common throughout Alberta, with similar events held regularly, much closer to the main markets of Calgary and Edmonton. Finally, the facility manager argued, "What's country and western got to do with this place?" (Interview with Manager, Lines 1500 to 1501).

In the manager's view, the division was not concerned with whether the proposed event was actually relevant to the site's horse-drawn carriage collection. He believed that the division only wanted to gain financially from a popular type of local entertainment. The manager persisted in the mistaken belief that plans could be developed for programs that would lead to significant growth in visitors and revenues. It was motivated by the desire to increase the numbers of visitors to the world-class carriage collection, and was unconcerned with large, unrelated revenue generation possibilities.

Finally, in the third narrative, the facility manager described how the division was asking each site to fundraise, to cover expenses no longer offset by their dwindling budgets. In this 1997 narrative, the manager told how he wanted to send the RACC curator for training in conservation techniques. The site had not had a full-time conservator since 1993, when the previous one had taken a buy-out package. The Centre was not allowed to replace the position, and RACC now shared a conservator with several other sites. This busy person seldom visited the Centre, and for a full year, he had not found time to examine seven quarantined vehicles in Lethbridge, to approve their release to RACC's collection.

To solve this human resources problem, the facility manager had suggested to a division-level manager that he should send RACC's curator for formal training in conservation techniques. The division-level manager endorsed the plan, but declined to provide the necessary funding, suggesting that the facility manager needed to cover the costs through local fundraising. However, in the manager's view, it was not practical for him to fundraise for this purpose.

> Yes, sure, Joe Blow in the sand and gravel mixer down the road is definitely going to give me one thousand dollars to send a curator [for professional training], when he doesn't know what a curator is . . . They don't know what conservation is all about. They think it is some wetlands. And how am I going to attract all this [money] for that sort of thing? (Interview with Manager, 1997, Lines 1017 to 1023).

In the manager's view, fundraising should take place at the division level, as in most other large organizations. However, the division had delegated those responsibilities to RACC and the other sites. "Steer the ship by all means, but fundraise primarily. They don't get involved with the money garbage, so we are fundraising." (Interview with Manager, 1997, Lines 992 to 994).

In the manager's view, the division was the legitimate fundraiser on behalf of the site, and thus would be more successful in attracting financial resources. "What can I – somebody with very little social influence in a little dorky town like this – do about influencing oil money in Calgary?" (Interview with Manager, 1997, Lines 988 to 990). In his view, as the site that misled and disappointed hopes, the Centre would be unable to fundraise successfully.

Manager's construction of success in incorporating the division. The preceding interpretation suggests that the manager's narratives constructed RACC as a social actor that was unable to incorporate the division into a successful relationship. In my view, the site's identity as The Deceiver provides an explanation. The site was an actor that disappointed the hopes of other actors because of its low visitation, and the persistence in the mistaken belief that it could develop successful alternative programming, related to its world-class horse-drawn carriage collection.

Therefore, the manager at the site did not accept the plans and programs suggested by the division. He believed that the division had mainly illegitimate, economic interests in interacting with the site, and that a strong relationship with the division would not benefit the site. This is important, because a successful relationship with the division might have helped the site to develop a stronger IO network with other actors.

The Visitor

In the first section of this chapter, I suggested that low visitation had contributed to construction of the site's identity as The Deceiver. The collection of Victorian-era carriages was too narrow in focus to attract large numbers of visitors, appealing mainly to senior citizens and those interested specifically in horse-drawn carriages. Also, the location of the Centre did not encourage large numbers of people to visit on impulse. Similarly, in the first section I suggested that the site had persisted in a mistaken belief, believing it could develop new programs that would attract large numbers of additional visitors. The site also enacted the visitor as an actor that wanted access to alternative programs, such as birthday parties and multiple-breed horse programs.

Since the site was unable to attract large numbers of visitors, it is not surprising that the RACC interviews included frequent references to visitors and visitation. However, it is surprising that the manager told only two narratives specifically about the site's interactions with visitors. The manager believed that, in general, people were not especially interested in viewing the site's carriage collection.

In this narrative, taken from the 1997 interview, the manager talked about his efforts to attract more repeat visitors from the local area, but especially school children. RACC had recently experienced a decline of almost 40 per cent in school visits, much more severe than the decline experienced at either HSIBJ or FSIC. Apparently, the local schools no longer had the flexibility to use funds from other accounts for bus transportation to the Centre. To compensate for this noticeable drop in visitation, the facility manager decided to hold a Remembrance Day event in the Centre. He planned to invite a number of local armed forces veterans to the Centre just before November 11th, to interact with Cardston school children.

> . . . [T]hey will each have a table and have all their mementos. I will get all the school kids in the [local] elementary and junior high to send their classes at prearranged times and actually meet these guys and hear their stories first hand. Look at their mementos – what was this stuff used for and this kind of thing. . . . And that should spike my education visitation for early November quite nicely. It is a serious problem and I don't know a way around it. (Interview with Manager, 1997, Lines 1093 to 1100].

The site was willing to mislead other actors, by increasing short-term visitation figures with a largely unrelated event. The war mementos had no relation to most of the horse-drawn carriages in the Centre's exhibits. The manager also appeared to enact the local schoolchildren as important visitors who were somewhat uninterested in the carriage collection, but would visit the Centre if it offered an interesting special program. The manager offered the local schools a program that was relevant to their Remembrance Day curriculum, and in return gained access to financial resources – the minimal fee typically paid by school visitors.

Manager's construction of success in incorporating the visitor. The manager's narratives enacted RACC as an actor that was minimally successful in forming a relationship with visitors. The site successfully attracted senior citizens and aficionados of horse-drawn carriages. They were also successful in attracting visitors when they presented the site as a source of entertainment. For example, RACC employees had rewritten their school programs, to make them more entertaining, hoping that teachers and children would want to return to the Centre.

> In the last year the education programs have been extensively revised – rewritten and changed to provide more of an entertainment element. . . . [We are trying to] make it something that is pleasant and enjoyable, memorable so it can become a part of their life if they want to later – part of their

> intellectual life. (Interview with Employee, 1996, Lines 956 to 958; 999 to 1000)

Similarly, during the summer, RACC began to send an employee dressed in a Victorian-era costume to Waterton Lakes National Park. Once a week, the employee visited the two largest hotels in the small resort town. The facility manager's statistics suggested that, in one summer, her presentations on the Centre's attractions had drawn about four thousand extra people from the many Canadian and U.S vacationers in Waterton Lakes National Park. Finally, the site's annual Remington Day event typically attracted three to four thousand people, with highlights including a petting zoo and sheep-herding contest.

However, the RACC collection itself was too narrowly focused to appeal regularly to a broad cross-section of people, probably because the general use of carriages had ended long before most people were born.

> [We are] trying to bring to life something that is in the now distant past for most people. For some people it is not distant. It is part of their childhood and they remember it vividly and identify with it enormously. But that is not true for most people. (Interview with Employee, 1996, Lines 14 to 18).

The manager's narratives about interactions with the visitor continued to construct the site's identity as The Deceiver. The general public did not value the horse-drawn carriage collection, and the site's low visitation was a disappointment. However, when small numbers of visitors came to the Centre for its entertaining programs, the manager's interpretations of their motives showed he optimistically believed he could substantially increase visitation through changes to the site's programs.

The Community

Earlier in this chapter, I described how Don Remington, a prominent citizen of Cardston, had donated his carriage collection to the provincial government, with the condition that it must remain in Cardston. The government accepted the donation despite Remington's proviso, because they had recently embarked on a plan to develop a system of cultural sites throughout the province. The government believed that by building interpretive centres such as RACC, in small communities such as Cardston, they would generate significant spin-off economic benefits for those communities.

The planning documents for RACC predicted that large numbers of visitors would travel to RACC, to see its world-class horse-drawn carriage collection. Thus, the people of Cardston expected their town to grow, as businesses and civic offices expanded to meet the needs of tourists and a larger population. However, as described earlier in the chapter, the community's hopes were disappointed. Nevertheless, they continued to support the Centre. "The town is heavily committed to this project in terms of moral support and financial commitment, financial contribution." (Interview with Employee, 1996, Lines 1230 to 1231). In this subsection, I describe my interpretation of two partial narratives, to illustrate how the local community showed their interest in the Centre's success.

In the first partial narrative, the facility manager told about the strong personal interest every community member had shown in RACC. In the manager's view, most people in Cardston felt as though, in some way, they partly owned the Centre. As a co-owner, they wanted to provide advice to the facility manager.

> . . . [E]verybody here feels that they have an input and some kind of vested ownership of this Centre. . . . I'm talking about everyone. I'm talking about from the local vet down to the guy where you pull in to buy gas, and he starts telling me how I should be doing my program and how I should doing that and I should be doing this. (Interview with Manager, 1996, Lines 2316 to 2326).

Similarly, community members would return from far-flung locations, and complain to the manager that the Centre did not position its brochures in those places. In their view, this was a missed opportunity to attract visitors from such distant locales as New Orleans and Denver. However, the manager disagreed. "What do you do? Go into a long discourse about the magnetic size of the attraction versus the distance you advertise from? No, you just had [better] bend a bit, and say `I'll certainly discuss that.' " (Interview with Manager, Lines 2334 to 2337).

The manager constructed the community as a well-meaning actor, but one without the necessary knowledge to provide advice on Centre operations. He saw the community as a legitimate stakeholder, one that felt a sense of ownership in the Centre. Although he did not believe their advice was always appropriate or even correct, it is important to note that he did not believe he could simply discount it. The facility manager believed that the community did not have the legitimate knowledge to suggest programs and operational techniques for the Centre. Although the community was a legitimate stakeholder in the site, he believed it was inappropriate for community members to try to direct the manager's decisions. He persisted in the mistaken belief that it could develop its own successful plans for growth in visitation and revenues.

In the second partial narrative, the manager told about the community's tendency to communicate directly with provincial government officers, to express any concerns about the Centre's operations or long-term sustainability. As an example, he mentioned complaints about cuts to RACC's carriage ride program.

> You wouldn't believe the letters that go charging up to the minister saying "Why aren't – haven't you got the horses and carriages? When I was here in 1993, we had a carriage ride. Why don't we have a carriage ride any more?" You get complaints immediately. . . . "Oh, I see your program is slowly winding up here. You are not making enough visitation. You used to start the carriage ride at the beginning of May and now you are not doing it [until] . . . July. Well, obviously it is a dying project." (Interview with Manager, 1997, Lines 1513 to 1519).

Partially to prevent such complaints, the site now offered carriage rides beginning in June. However, they had to subsidize the program, since the volume of visitors was not large enough to recoup costs until visitation jumped in July.

The facility manager constructed the site as a social actor that disappointed hopes through low visitation. That identity also served as the filter through which the manager interpreted the interests of the community. The site saw the community as a powerful actor that was interested in the long-term viability of the site. Disappointed with the Centre's inability to attract enough visitors to justify offering costly programs, the community was willing to express its concerns to the provincial government. The community was a powerful, political actor, one that was able and willing to use its influence to ensure the long-term success of the Centre, and thus protect its "vested ownership" in the site.

Manager's construction of success in incorporating the community. The RACC was only partially successful in forming and maintaining an IOR with the community of Cardston. The manager constructed the community as an actor that wanted the Centre to succeed. They acted like co-owners of the site, based on their financial and moral support of the Centre, and often felt compelled to suggest improvements to the manager. However, the people of Cardston were concerned about the long-term viability of the Centre, and thus openly critical of its inability to increase visitation.

The site's identity as The Deceiver provides an explanation for its failure to form and maintain a strong IOR with the community. As The Deceiver, the site had disappointed their hopes, when the initial predictions of strong visitation were not realized. The community wanted to form an IOR with the Centre, but its hopes were continuously disappointed, when new programs did not create the desired spin-off economic benefits.

The Friends of Remington-Alberta Carriage Centre

Historically, the Friends society had always interacted cooperatively with the carriage centre, even before its physical existence. The society had formed in 1987, when the provincial government agreed to build the interpretive centre in Cardston. Over the next several years, while the division planned and built RACC, the Friends worked to coordinate the community's enthusiasm for the project (Interview with Employee, 1996, Line 1182). Specifically, the Friends interacted with business people and civic leaders, urging the community to prepare for the large numbers of tourists that the site would attract. At the request of the Advisory Board, they also raised funds for a statue of Don Remington, to be placed outside the entrance to the planned building. After RACC opened in 1993, the Friends society ran the gift shop, and administered the contract for the cafeteria, while continuing in their roles as site champion and community intermediary.

By 1996, the Friends society assumed a larger role in staffing at the Centre, as had occurred throughout the division. The Friends society was now the official employer of all summer interpretive staff at RACC. However, the facility manager continued as the unofficial employer, exerting "overwhelming functional control" over most of the staff members (Interview with Manager, 1996, Line 791). In 1997, RACC's interorganizational relationship with the Friends society changed again, as it did at the other sites in the system. Under the terms of their new cooperating agreement, the Friends society now both collected and controlled the disbursement of all admission fees at the Centre. As I have described in previous chapters, these cooperating agreements ensured that the admission revenues generated at each HSS site would remain there for the site's use, rather than become enfolded into the province's general revenues. However, the agreements also greatly increased the influence of the Friends society at each HSS site. In a lengthy narrative, the manager described how the Friends societies now had more influence over decision-making at the site.

> Friends organizations have taken on a new significance, fundraising and collecting entrance fees, with millions of dollars now moving through these groups and being outside the formal control of the provincial treasurer or indeed the site manager. The Friends organizations now have considerable influence in determining how the money they raise will be spent." (Interview with Manager, 1997, Lines 280 to 285).

This new arrangement led to difficulties at some of the other sites including FSIC, with the Friends societies refusing to release funds, and essentially overruling professional programming decisions. However, RACC's cooperative relationship with its Friends society continued. "Certainly at this centre, they don't spend money without my agreeing and consensus, and it works extremely well. . . . I may have to argue my case quite well, but they have never turned me down." (Interview with Manager, 1997, Lines 297 to 300). Indeed, the facility manager wanted to preserve that strong IOR with the Friends. Therefore, he had recently refused to sign a letter to RACC's Friends society, as directed by a division-level manager. According to the manager, the purpose of the letter was to reassert control over the Friends, and remind them of their secondary, supportive role at the site. However, in the facility manager's view, the letter would generate unnecessary tension and could potentially exclude the Friends from real involvement with the site.

By entering into the cooperative agreement, the Friends society developed an effective power-dependence relationship with the Centre. That is, RACC was dependent on the Friends society for access to its admissions revenues, which gave the Friends power in their relationship. However, it is important to note that the site also had power in the relationship, since the cooperating agreements were renewed annually. Essentially, both actors were dependent on one another, which encouraged them to maintain their relationship. The manager constructed the site as an optimistic actor, which could best decide which programs would increase visitation.

Manager's construction of success in incorporating the Friends society. The site was able to develop a strong, cooperative IOR with the Friends society. The relationship had developed historically as a supportive one. Indeed, the Friends society had generated community enthusiasm for the Centre, long before it was built. Years later, the IO relationship remained strong, with a Centre employee stating that members of the Friends board were ". . . not only supportive, but they are also knowledgeable about the situation we are facing here and what we need." (Interview with Employee, 1996, Lines 1089 to 1091). The manager constructed the two actors with similar goals for the site. That is, they both wanted the Centre to succeed, for complementary reasons. RACC wanted to attract visitors to its outstanding carriage collection. The Friends society wanted to help them do that, while generating spin-off benefits for the community.

I suggest that RACC's identity helps us understand how the manager constructed a successful IOR with the Friends society. First, the site's interaction with the Friends society helped to reinforce its identity in its potentially optimistic role. The Friends society had generated community enthusiasm for the site. However, those high levels of enthusiasm changed to disappointment, when the promised visitors did not appear. As The Deceiver, the site optimistically believed that it could generate higher visitation levels, despite its remote location and focused product. The Friends society agreed, and worked to help the Centre deliver those programs. For example, although the Friends controlled admission fee revenues, they did not deny any of the manager's requests for program expenditures.

Summary

In Chapter Four, I argued that each site's organizational identity would influence its ability to form and maintain successful IORs with external actors. In the RACC interview narratives, I found evidence to support that argument. First, my interpretation suggests that the manager's narratives constructed a successful IOR with the Friends society. In my view, the site's identity as The Deceiver provides an explanation. The Friends society had helped to generate initial community enthusiasm for the project, and later worked cooperatively with the site to try to improve visitation and revenues. That is, the Friends society both constructed and accepted the Centre's identity as a potential winner. The RACC manager believed that the Friends society had willingly formed a power-dependence relationship with the site. RACC and the Friends society became dependent on one another for development of programs and access to resources.

Second, the manager's narratives constructed a partially successful IOR with the community of Cardston. The community was initially enthusiastic about the project, supporting it both financially and morally. However, when the site did not attract the promised high levels of visitation, it disappointed their hopes that they would benefit economically. In that way, the community constructed the site's identity as The Deceiver, the social actor that disappointed hopes. Nevertheless, the community continued to act as though they were `co-owners' of the site, providing unwanted advice to the facility manager, and complaining about programming decisions to the provincial government. Again, the community constructed the site as The Deceiver, the collective social actor that optimistically believed it could build much higher levels of visitation. However, as The Deceiver, the site did not value the advice of the well-meaning community, although the facility manager listened to the community's advice, because it was a powerful actor. That is, the community was recognized as a legitimate, powerful stakeholder, and RACC needed to acknowledge its economic interest in the site. However, in the manager's view, community members did not have the professional qualifications to make detailed, operational suggestions.

Third, the manager constructed RACC as an actor that was only minimally successful in forming and maintaining a successful relationship with the visitor. The site was unable to form a relationship with a broad cross-section of visitors, because of its narrowly focused collection and remote location. Indeed, the site's general inability to form a successful relationship with the visitor was instrumental in constructing its identity as The Deceiver, the social actor that disappointed the hopes of its community. However, the site was able to form a relationship with some types of visitors, including senior citizens and carriage aficionados. The site's success in attracting some types of visitors encouraged it to persist in the belief that it could dramatically increase its visitation, if only it learned how to appeal to the interests of more people. In the manager's view, the Centre could strengthen its ties with visitors, if he met their programming interests and needs. Thus he proposed a multiple-breed horse program, and changed the school programs to provide more entertainment value.

Finally, the site believed it could develop programs that would greatly boost its visitation. However, the division contested the site's identity, wanting to impose its own program ideas onto the manager. The division wanted the site to generate additional revenues through ill-conceived programs, often unrelated to the site's carriage collection. The manager interpreted the division's motives as illegitimate. In his view, the division should "steer the ship", but refrain from offering inappropriate and unwanted instructions on the site's programs and events.

Chapter Summary

This chapter described my interpretation about how RACC's identity as The Deceiver became established. In the first section of the chapter, I explored how the manager's narratives about RACC's interorganizational interactions with the community, the visitor, and the division constructed the site's identity as the social actor that disappointed hopes, yet optimistically believed it could greatly increase visitation through appropriate programming decisions. In the second section, I illustrated my argument that the manager's narrative construction of the site's identity as The Deceiver influenced its success in forming and maintaining interorganizational relationships. My interpretation of the narratives suggested that the site was unable to maintain successful IORs with the actors that contested its identity and saw it in the main as Deceived. The following chapter presents my conclusions.

Chapter Eight

Conclusion

This dissertation was the first stage in my exploration of interorganizational relations. After conducting initial field research in three Southern Alberta cultural organizations, I began to explore the literature on IORs, as I tried to make sense of my field observations. Specifically, I had observed that the three cultural organizations had unique organizational identities, and believed that those identities somehow influenced the success of the site's relationships with its community stakeholders.

As shown in Figure 8.1, my exploratory journey through the literature included several content and process-oriented approaches to understanding organizations and IORs. Eventually, I developed a conceptual framework that recognized the central role of identity in understanding IO processes. In the last three chapters, I illustrated that framework with my interpretation of narratives extracted from pre-existing interviews with the managers and other employees at the three cultural organizations. My interpretation of those narratives suggested how each site's identity was constructed, as the manager and other employees developed narratives around its interorganizational interactions. In this final chapter, I discuss my illustrative findings compared to the existing literature on identity and IORs, comment on the contributions and limitations of the dissertation, and conclude with suggestions for further research. However, I begin with a more detailed review of previous chapters

Review of Previous Chapters

In Chapter One, I described my initial fieldwork at three southern Alberta cultural organizations: Frank Slide Interpretive Centre (FSIC); Head-Smashed-In Buffalo Jump (HSIBJ); and RACC (Remington-Alberta Carriage Centre). As I explored my field material, I identified recurring questions about the processes that are involved in managing interorganizational relationships (IORs). My exploration of the initial field material also suggested to me that the sites were collective social

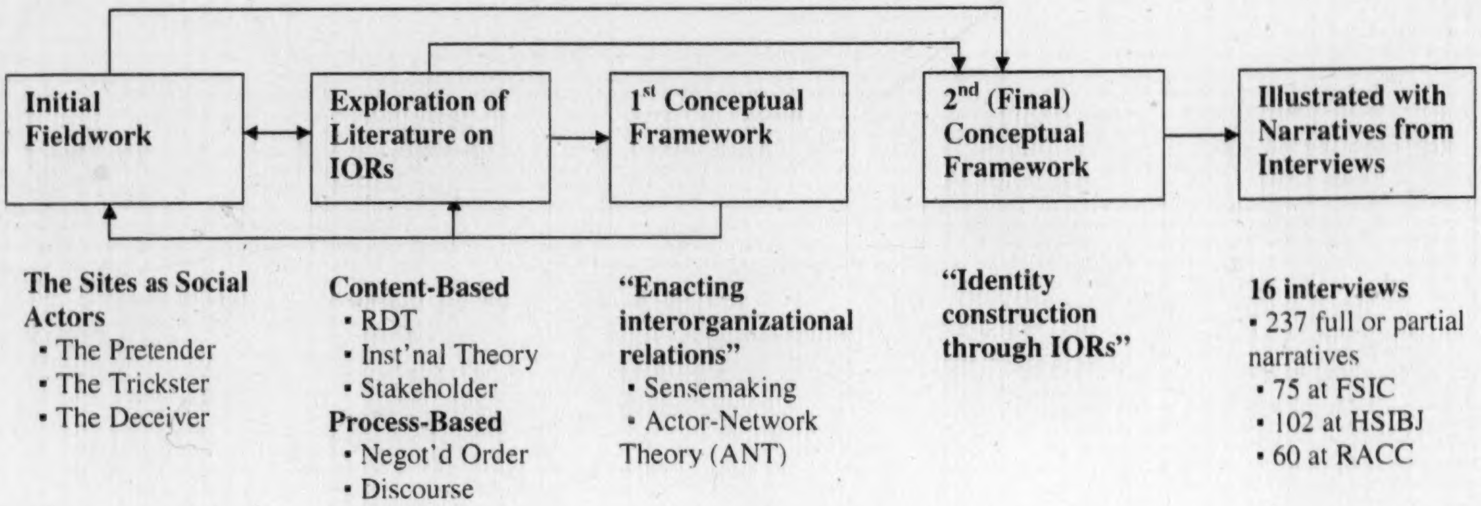
Initial Fieldwork
Exploration of Literature on IORs
1st Conceptual Framework
2nd (Final) Conceptual Framework
Illustrated with Narratives from Interviews
The Sites as Social Actors
• The Pretender
• The Trickster
• The Deceiver
Content-Based
• RDT
• Inst'nal Theory
• Stakeholder
Process-Based
• Negot'd Order
• Discourse
"Enacting interorganizational relations"
• Sensemaking
• Actor-Network Theory (ANT)
"Identity construction through IORs"
16 interviews
• 237 full or partial narratives
• 75 at FSIC
• 102 at HSIBJ
• 60 at RACC

Figure 8.1. Detailed structure of the dissertation.

actors with unique organizational identities, and that those identities were particularly constructed through their interorganizational (IO) interactions. Thus, I also introduced names for each site that encapsulated my interpretation of each site's identity, developed during my fieldwork. During the research these names essentially operated as shorthand for my interpretation of each site's identity.

In Chapter Two, I explored the advantages and disadvantages of resource-dependence theory (RDT), institutional theory and stakeholder theory, three mainstream, content-based approaches to understanding IORs. The content-based approaches contributed to my understanding of why organizations enter into IORs, how managers could assess the characteristics of potential and current IO partners, and to a lesser extent, how managers might manage ongoing IORs. First, my review of RDT suggested to me that the cultural sites would enter into IORs to gain access to necessary resources, and thus as a means of reducing environmental uncertainty. Nevertheless, RDT also suggested to me that such resource exchanges could reduce a site's decision-making autonomy, and preclude future alternative IORs. However, my review of the RDT literature also outlined key managerial tactics that the facility manager might undertake to manage resource dependencies, such as interlocking board memberships.

In contrast to resource dependence theory, stakeholder theory suggested that the facility managers could develop more detailed interpretations about the reasons that various external actors interacted with the site. Some actors would have economic interests in the site, while others might have political ones, for example. More recent stakeholder theory literature suggested that managers could prioritize the claims of different stakeholder groups, privileging the needs of legitimate stakeholders. This suggested to me that manager would seek to identify the claims of different external stakeholder groups, and that they would be more likely to enter into enduring IORs with legitimate stakeholders. They would be less likely to form `successful' (i.e., beneficial) IORs with illegitimate stakeholders. My review of institutional theory suggested that managers might enter into one or more types of IORs to increase their legitimacy. Thus, governmental policies could act as a mimetic force for public sector organizations such as the three cultural facilities.

That is, they could coerce them into development of public-private partnerships, which would make them appear more accountable to taxpayers. Institutional theory suggested that formation of such IORs would lead to greater legitimacy and thus improved access to necessary financial resources. Nevertheless, none of these content-based approaches allowed me to incorporate organizational identity as a central argument, nor did they further my understanding of key IO processes.

In Chapter Three, I described the continuation of my research journey, as I explored the process-oriented literature on IORs. First, I explored the negotiated order and discursive construction literature on IO processes. These process-oriented approaches contributed to my conceptualization of IORs through an improved understanding of key IO processes. Specifically, the negotiated order literature provided an interpretive view of IORs. Thus, relevant research within this perspective argued that IORs are continuously constructed through the interactions of individuals within the different organizations. More specifically, this research suggested that IORs consisted of the intersubjective development of shared meaning about those relationships between two or more organizations. Literature within the negotiated order perspective also recognized a role, albeit not a central one, for organizational identity. Specifically, it suggested that identity is negotiated through interpersonal interactions within the organization and then renegotiated through social interactions with external actors. The discursive construction perspective contributed less directly to my conceptualization of IORs, since I was not taking a critical approach. Nevertheless, it did explain how organizations would develop interconnected IO networks with external actors around common issues from the broader context, such as tourism and economic development. However, I argued that neither of these approaches provided a complete processual analysis.

Also in Chapter Three, I described a detour in my research journey, as I attempted to illustrate my initial conceptual framework. Specifically, I described how I developed and then unsuccessfully attempted to illustrate a two-stage enactment model of IORs based on sensemaking and actor-network theory. It is important to note that the sensemaking approach made a key contribution to the theoretical direction of my dissertation in several ways. First, this perspective noted the importance of identity construction as individuals enact their external environment. Thus, the approach asserted that individuals constructed their identity through social interactions, and particularly through the reflected observations of other individuals. This is an argument that I incorporated into my final conceptual framework, although at the collective level. Second, the sensemaking approach suggested that collective sensemaking occurs as individuals draw on stocks of knowledge or cognitive scripts to interpret social interactions. Again, I incorporated a similar argument into my final conceptual framework, suggesting that the managers' interpretations of external actors would reflect key elements of the content-based approaches to IORs. Finally, my review of the limited literature on sensemaking and IORs suggested a strong recognition of the cognitive models or processes that occur as managers jointly enact IORs. This is consistent with the narrative approach that I used to illustrate my final conceptual framework. In contrast, actor-network theory contributed less significantly to the final theoretical direction of my dissertation. Nevertheless, the sociology of translation did contribute to my understanding of IO formation. Specifically, it suggested to me that managers would use a variety of techniques, including texts or ideas, to incorporate external actors into an IO relationship.

At the end of Chapter Three, I wrote that the two-stage enactment model did not provide a central role for identity, and thus I returned to the literature for alternatives. I now believe that it also proved to be a complex and difficult view to operationalize or use here. Thus, I did employ it to some extent in my interpretations, but did not use it as fully as I might have if I had done a more complete assessment of an enactment model.

In Chapter Four, I outlined my final conceptual model, based on three themes that I identified after returning to the limited literature on identity and IORs. I extracted these themes from literature that I had reviewed in previous chapters within the different perspectives or frameworks, and several other relevant theoretical and empirical publications. I asserted that they could form the foundation of a new conceptual framework, which emphasized the role of identity as a basic element for understanding IORs. I return to that framework in more detail in the section that follows, and in my discussion of the research contributions. Chapter Four also explained the approach that I used to illustrate the conceptual model. Specifically, I used a narrative-based approach to illustrate the final conceptual framework through my interpretations of employees' narratives about each cultural site's IO interactions. Again, it is important to note that I discussed methodological issues in a conceptual dissertation only to clarify how I developed my interpretation of the narratives, and why I believe that interpretation is appropriate. Chapters Five through Seven presented my interpretation or story about how each of the three cultural sites, or more specifically its individual members, constructed its organizational identity as they retroactively developed explanatory stories about the site's IO interactions.

Illustrative Analysis and Existing Research on Identity and IORs

In this section, I discuss the links between my illustration of my conceptual framework and the existing literature on identity and IORs. I consider possible explanations and implications of the narrative that I presented in the three preceding chapters. The discussion is organized around organizational identity and the three components of the conceptual framework (i.e., identity construction through interorganizational interactions; identity as a lens or filter for interpretation of external actors; and IOR outcomes and identity).

Organizational Identity: The Pretender, The Trickster and The Deceiver

This study suggested that the three sites had unique organizational identities, or characteristics that were fundamental and distinctive about them, according to their members (Albert & Whetten, 1985). Thus, based on my analysis and interpretation of the interview narratives, I argued that RACC's identity was encapsulated by the name `The Deceiver'. That is, I suggested that RACC had disappointed the hopes of itself and other actors, because its visitation levels were not as high as those predicted by the initial steering committee, nor Alberta Tourism. RACC continued to deceive itself and other actors, through its optimistic plans to increase revenues with various cost recovery programs. My initial field research and interpretation of the interview narratives suggested that the site's low visitation rates were mentioned frequently by employees at RACC, signifying that it was a fundamental characteristic of the site. However, only the manager discussed plans for raising revenues often, probably because he was most responsible for planning programs at the site level.

In contrast to RACC, I saw HSIBJ as a collective social actor with an ambiguous organizational identity. I argued that the name `The Trickster' represented its capricious nature as the culture hero for the Blackfoot people. The site sought to preserve and accurately represent the traditional culture of the Blackfoot people. At the same time, HSIBJ sought to gain financially through its commercialization of that culture. Gioia (1998) argued that organizations may display different aspects of their identity to different external actors. Thus, we could argue that HSIBJ displayed its cultural hero facet to the Blackfoot Nation and First Nations visitors, while it displayed its commercial aspect to the local businesspeople, the division and foreign tourists. This argument is consistent with Walpole (2000), who examined a merger between two departments in a university. After the merger, the Library Studies faculty members presented a practitioner-oriented identity to the field, while they presented a research-oriented identity to their Education colleagues, who were more focused on research concerns.

At FSIC, my interpretation of the narratives suggested that budget cutbacks were creating challenges to the site's identity as `The Pretender', the actor that presumed to speak for the region through high-quality exhibits and interpretive programs. According to Corley, Gioia and Fabbri (2000), organizational identity is more malleable than Albert and Whetten (1985) originally suggested. Thus, the recent challenges to FSIC's identity may mean that the site's identity will begin to evolve away from The Pretender. Alternatively, the manager and other employees may maintain the site's identity as The Pretender, while they reconcile new practices (e.g., business planning; cost effective programming) into the Centre's identity (Corley, et al., 2000). For example, FSIC employees could accept that cost effective programming would allow the Centre to survive, and thus continue to speak on behalf of the region.

Identity Construction Through IO Interactions

The illustrative interpretation presented in this research suggested that an organization constructs an understanding of its identity in relation to other organizations (e.g., Gioia, 1998; Callon, 1986b). This is consistent with Albert and Whetten (1985), who theorized that an organization constructs its identity, as it reflects on interactions with one or more external actors. Thus, for each site I presented an overall narrative, based on my interpretation of the managers' story line about the site (Mishler, 1995), to suggest that the site constructed its identity through interactions with external actors (i.e., the division, the visitor, the community, the Friends society).

The research also suggests that IO interactions may contest an organization's identity. For example, my interpretation of the narratives suggested that the Historic Sites and Services division contested the identity of each site. FSIC's identity as The Pretender, the collective actor that presumed to speak for the region, was contested by the division's expectation that the site would interpret the region's cultural history. Instead, the site wanted to preserve and interpret a broader range of topics relevant to the region's history. The division also contested RACC's organizational identity as The Deceiver, the actor that disappointed hopes. The RACC had optimistic plans for program development to improve visitation. However, the division did not accept those plans, and wanted the site to use the program ideas of division-level managers. Finally, the division also contested the culture hero aspect of HSIBJ's ambiguous identity as The Trickster, by diverting funds and positions away from the site, and thus hindering its ability to accurately portray the Blackfoot culture. My interpretation about the contestation of each site's identity is consistent with Scott and Lane (2000), who theorized that interactions with some external actors will contest an organization's identity.

Organizational Identity as Context for Interpretation of External Actors

Galaskiewicz (1985) argued that scholarship on interorganizational relations would advance if we considered the context and actors' motives for entering into IORs. In this research, I have contributed to the literature with my argument that organizational identity provided the context through which managers would develop an understanding of an external actor's motives for entering into an IOR (Gioia & Thomas, 1998, in Bouchikhi, *et al.*). Drawing on Gioia (1986) and Weick (1995), I also argued that managers would interpret the motives of potential IO partners within the context of the site's identity, drawing on their cognitive scripts about IORs (Gioia, 1986; Weick, 1995).

In the three empirical chapters, I illustrated this argument. For example, in Chapter Six I presented my interpretation of a narrative that HSIBJ's manager told about visitors to the site. In that narrative, the manager seemed to incorporate key elements that reflected stakeholder theory to construct the visitor as an actor with a legitimate interest in the site's archaeological evidence. As The Trickster, HSIBJ was the culture hero of the Blackfoot people. Thus, it wanted to provide visitors with access to information about the external manifestations of that culture.

My interpretation is consistent with Dutton and Dukerich (1991), a qualitative case study of IO interactions between the Port Authority of New York and New Jersey and nearby homeless people. These authors developed a conceptual framework, which argued that identity and image were filters or lenses through which members of the organization interpreted the external environment. The Port Authority's resulting actions, based on those filtered interpretations, influenced them to develop programs to assist homeless people in the area. My interpretation is also consistent with Scheid-Cook's (1992) research on enactment of the external environment, which I discussed in Chapter Three. Scheid-Cook (1992) argued that stocks of knowledge held by mental health professionals were based partially on professional values and ideologies. Further, those stocks of knowledge influenced the interpretations they developed about court-mandated treatments for the mentally ill.

Organizational Identity Influences Outcomes of IORs

My interpretation of the narratives also suggested that organizational identity was linked to the outcomes of IORs. That is, it suggested that the manager's understanding of his organization's unique characteristics could prevent him from forming and maintaining IORs. This is important, because inability to sustain interorganizational interactions may block access to necessary resources, such as technology and knowledge.

Thus, RACC's manager enacted a successful IOR with the site's Friends society. Initially, this external actor helped to create community enthusiasm for the Centre. After the Centre was built, the Friends society cooperated with the site to try to improve visitation and other revenues. That is, the Friends society both constructed and accepted the site's identity as The Deceiver, an actor that persisted in the mistaken belief it could attract more visitors and revenues to the facility, despite its remote location and highly focused collection.

This is consistent with Scott and Lane (2000), who theorized that the negative assessments of external actors could make it difficult for an organization to achieve its goals. For example, it is less likely that RACC's IOR with the Friends society would have been successful, if the manager had constructed the Friends as an actor that contested the site's identity, and disagreed with his optimistic plans for revenue-generating programs. It is also consistent with Clark (1999), who studied managers' cognitions around identity and image during formation of a strategic alliance. This author found that, as the alliance progressed, a future joint identity was supported as managers developed interpretive schemes or cognitions suggesting that the alliance would assure organizational survival and competitiveness. We can speculate that, if the managers had developed less positive interpretive schemes about the alliance, they would not have supported the development of a joint identity for the alliance.

My illustrative material on the link between identity and the outcomes of IORs is also consistent with an empirical study by Skålén (2004). That research examined the impact of a New Public Management initiative on organizational identity in a Swedish Public Health Authority. Findings indicated that the PHA developed a fluid, heterogeneous organizational identity, rather than a stable, business-oriented identity as expected. The author suggested that this occurred because two actor-groups within the PHA (i.e., old administrators, new management) enacted different identities for themselves, while they ascribed different identities to the other group. Specifically, Skålén (2004) argued that the identity ascribed to the other group hindered the success of the NPM initiative. This study is important, because it suggests that the success of an external initiative, such as an IOR, may be hindered by the identities the actors ascribe to each other. My findings are also consistent with Walpole (2000), an empirical study of the forced merger between two university departments. As described in Chapter Four and earlier in this section, a practitioner-oriented library department developed a hybrid identity, to form a successful merger with a research-oriented education department.

Contributions of the Research

This research makes a number of contributions to the literature on interorganizational relationships. First, the research developed and then illustrated a new approach to understanding interorganizational relations, one that had not been taken up in the literature before. A small amount of literature had also addressed the role of identity in IORs (e.g., Dutton & Dukerich, 1991), and even identity construction through IORs (e.g., Albert & Whetten, 1985). However, the current approach is different, founded on my argument that the sites were collective social actors with unique identities (Whetten & Mackey, 2002). Based on my exploration of the literature, I argued that organizations are collective social actors that continuously construct and sometimes contest their identity through ongoing interactions with external actors. I also suggested that an organization's identity becomes the filter or context through which managers interpret the interests or goals of interorganizational actors, and thus potential interorganizational partners. I argued that managers would draw on their scripts or general knowledge about IO relationships, to develop an interpretation of other actors' motives or interests for interacting with the organization. Finally, I argued that organizational identity was linked to a manager's interpretation of the success of its IO interactions.

The proposed framework is influenced most directly by sensemaking (e.g., Weick, 1995), and to a lesser extent, the negotiated order literature (Strauss, Schatzman, Ehrlich, Bucher, & Sabshin, 1963). Thus, it recognizes that understanding or meaning is constructed through social interactions, such as those that occur among individuals representing organizations within an IOR. It also recognizes the importance of individual interpretations, and adjustments to one's understanding, based on an interpretation of other actors' understandings about you or your organization. However, the sensemaking approach is typically applied at the individual level, to explain how we enact our own environment. Little sensemaking literature has focused on collective sensemaking of the IO environment. Similarly, the negotiated order literature typically focuses on interpersonal interactions, and the negotiation of order within organizations. Neither framework provides a strong explanation of the role played by identity in IO processes.

To a lesser extent, the framework is also influenced by my understanding of the content oriented literature (e.g., resource-dependence theory, institutional theory, stakeholder theory). Thus, that literature provided several explanations of the different ways that managers might interpret the interests or motives of external actors, and why they might choose one potential IO partner over another. Of course, these content-based approaches did not allow me to understand key IO process. Most importantly, they did not provide a central role for identity.

Thus, the primary contribution of the proposed framework is the acknowledgement of a central role for organizational identity. Indeed, my exploration of the literature, supplemented by my initial field observations, led to my view that we *must* consider identity to fully understand IORs. That is, I grew to understand that interorganizational relationships are mediated through identity. IORs construct and contest the identity of the site. That organizational identity also influences managers' interpretation of the interests that are held by external actors for engaging in IO interactions, and ultimately impacts on the organization's ability to develop beneficial ongoing IO interactions or exchanges.

Second, my exploration of the various content and process-oriented perspectives revealed several insights that many of these perspectives contributed to the development of my understanding that IORs are mediated by identity. Thus, my review of the negotiated order literature suggested that organizations might use negotiation tactics, such as PR campaigns, to develop a more favourable identity and thus potentially attract additional resources from other actors in its external environment (e.g., Geist, 1995; Levy, 1982). Within the discursive construction perspective, Lawrence, Phillips and Hardy (1999a) suggested that individual members of an interorganizational domain could try to discursively construct or negotiate a new role or identity for themselves. Specifically, through interactions with their social context, they would work to associate themselves more closely with the key issues of the IO domain, and thus gain more legitimacy and power with that domain. My exploration of the sensemaking literature suggested that organizations could develop an understanding of their identity through ongoing IO interactions (Ring & Van de Ven, 1994). As an IOR developed, organizations would develop shared understandings or expectations about their potential dealings. The ANT approach also contributed to my understanding of IORs as mediated identity. Thus, according to Callon (e.g., 1986b), a social actor's identity is constructed through purposive interactions with other entities in its actor-world or external environment. Those purposive interactions could include the translation of other actors into its actor-network, or into an IOR. For example, during *interessement* of other actors, the organization locks into place the association or IOR between itself and another entity (Callon, 1986b). Thus, the organization tries to prevent the enrollment of that entity into the actor-worlds or IORs of others.

Third, this research used an interpretive approach to illustrate how organizational identity was constructed through IORs. As discussed in Chapter Three, several authors have analyzed organizational narratives from a discursive approach (e.g., Hardy & Phillips, 1998; Lawrence, Phillips, & Hardy, 1999b; Phillips & Hardy, 1997). However, previous research has not used narrative inquiry to understand identity and interorganizational interactions. This is important, because this interpretive approach allowed me to explain the *process* through which organizational identity was enacted, as managers and other employees developed an understanding of the organization within its external environment, and developed more or less successful IORs. Thus, my interpretation of the narratives suggested that the organizations constructed a unique organizational identity through interactions with key interorganizational entities. For example, in Chapter Six I suggested that HSIBJ constructed its identity as The Trickster through IO interactions with the Piikani Nation and visitors. Based on my interpretation of the narratives, I argued that the site was unable to form stable IORs with actors whose interests clashed with those of the site, as reflected in my interpretation of their unique identity. For example, the FSIC was unable to form a stable relationship with the local community, as the manager believed it did not value the history she wanted to preserve and interpret.

This study also has implications for practice. Specifically, it suggests to managers that *interessement* of potential partners is most likely to occur when the organization's identity is constructed with characteristics that complement the interests, motives and goals of its potential partners. Similarly, managers should realize that some external actors will contest their organization's identity, and thus prevent them from achieving organizational goals. My research suggests that they should manage these IO relationships carefully if they may help to stabilize the organization's IO network. Further, the current study suggests that managers could present complementary aspects of their identity to desirable IO partners, to emphasize the benefits of forming an IOR.

Limitations of the Research

This conceptual study has three limitations. First, as with all studies that focus on a small number of organizations, I cannot make generalizations about the usefulness of my model. That is, my conceptual model may not generalize to organizations in the private sector. However, my summary of previous research on identity and IORs (Table 4.1) suggests that identity has an impact on interorganizational interactions, regardless of the sector or industry.

Second, the pre-existing interview data sometimes presented some limitations for the current study. The managers typically provided lengthy, richly detailed narratives in their interviews. However, the other government employees usually provided fewer stories and evaluations, probably because of their internally-oriented role within the organization. Therefore, I used the employees' narratives mainly to corroborate my analysis of the managers' narratives, rather than to extend my own narrative about each site.

Third, the pre-existing interview data that I used to illustrate the framework was collected only from members of the three cultural organizations. Thus, my illustration of the framework did not include the voices and stories of the external actors. That is, my illustration of the framework has shown how the managers developed an understanding of the interests that other actors held in their site. It has also shown how that interpretation served to construct or contest the site's identity. However, I have not shown how the *external actors* viewed their own interest in an IOR with the site. On one level, this analysis was omitted because I had access to pre-existing interview data only from the Friends society at each site.[1] However, I also believed that analysis of these interviews was not necessary to illustrate my conceptual model. The literature on organizational identity and IORs suggested to me that the *manager's* understanding of the site's identity was constructed through her *interpretation* of other actors' views of the site. Thus, it was not necessary for me to understand how those external actors would report that they viewed the site.

Recommendations for Future Research

The current study provides the basis for research propositions that we can examine in two future studies, as described below.

1. One study could focus on the interorganizational dynamics among one of the three sites, and its IO partners. Thus, the empirical site would expand to include data collection from those IO partners, along with interviews at the site itself. Sources of data would include interview narratives from the managers, supplemented with organizational documents and field observations. This study would address research propositions such as:
   How does the IO partner construct an understanding of the cultural facility?
   What stocks of knowledge or tacit knowledge does the IO partner use to attribute interests or motives to the cultural facility?

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[1] The pre-existing interviews at the three sites included six interviews conducted with Friends society directors and former directors or board members: FSIC (1997, 1999); HSIBJ (1997, 1999); and RACC (1996, 1999).

What understanding of the facility does each external actor hold? What characteristics do they believe are central or fundamental about the site? What characteristics do they believe are central or fundamental to their own organization?

2. A second study could examine the utility of the conceptual framework for understanding IO dynamics in a private sector organization. This would ascertain whether we can generalize the illustrative findings of the current study outside the public sector. Again, sources of data would include interview narratives from the managers, supplemented with field observations and organizational documents. This study would address research propositions such as:
   What organizational identity do the managers enact, as they reflect on their interactions with external actors?
   How do managers develop an understanding of current and potential IO partners for the organization?
   What stocks of knowledge or tacit knowledge do the managers use to attribute interests or motives to those external actors?
   How does the organization's identity influence outcomes of the IOR?

Concluding Comments

My research journey has suggested that the existing literature on IORs does not recognize the central role of organizational identity. After reviewing the limited relevant literature, I developed and then illustrated a conceptual model of IORs as mediated identity. Thus, I suggested that organizational identity is constructed through IORs. That identity becomes the lens or filter through which managers interpret IO partners, and vice versa. In my planned future research, I will continue to build on this study, as I look at the identity mediated nature of IORs both from the perspective of IO partners and within the private sector.

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